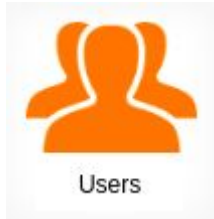



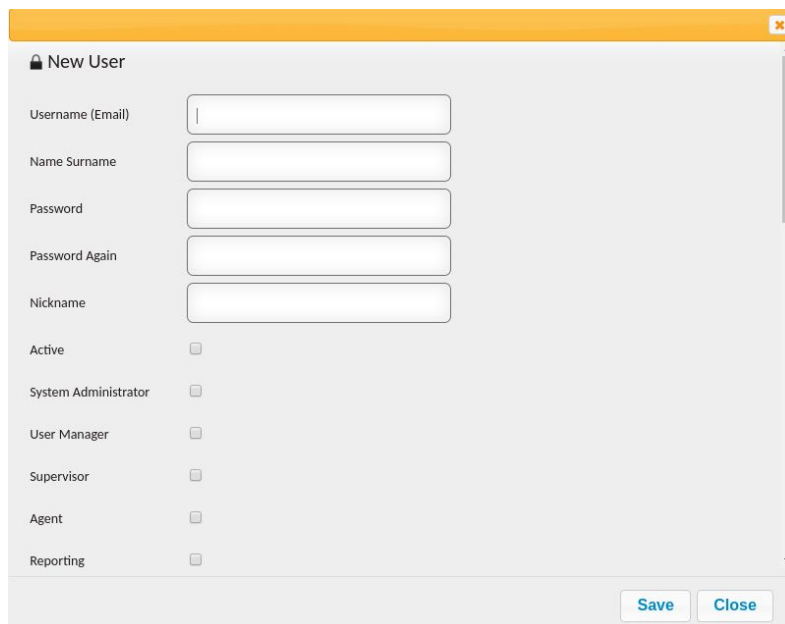
Users



Users registered in the system are displayed in this section. Adding new users, deleting existing users, authorizing users, determining roles, and notification settings are all carried out here.

Adding a Users

1. Click the add new user button,  , located in the top right corner of the page. The following pop-up will appear:



Note: All of the user functions are not displayed; the scroll bar has to be used.

-
- Click the “Username (Email)” input box, type the user’s email address an example is shown below:

Note: This is a mandatory field

Username (Email)	<input type="text" value="john.smith@callcenterstudio.com"/>
------------------	--

- Click the “Name Surname” input box, type the user’s name and surname an example is shown below:

Note: This is a mandatory field

Name Surname	<input type="text" value="John Smith"/>
--------------	---

- Click the “Password” input box, type a password for the user. An example is shown below:

Note: This is a mandatory field

Password	<input type="text" value="123456"/>
----------	-------------------------------------

- Click the “Password Again” input box and type the password used in the “Password” input box as displayed below:

Note: This is a mandatory field

Password Again	<input type="text" value="123456"/>
----------------	-------------------------------------

6. If desired, a nickname for the user can be displayed. Click the “Nickname” input box, type the user’s desired nickname an example is shown below:

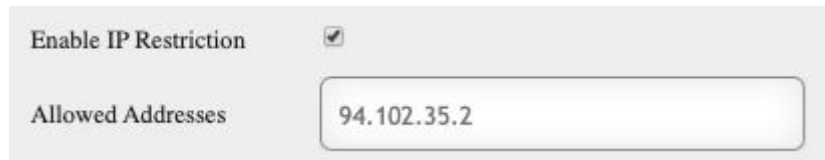
Nickname

7. Underneath the “Nickname” input box, there are 13 checkboxes allowing for different user permissions, check the desired permissions that apply to the new user. The definitions for each of these checkboxes is evident below:

<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">Active <input type="checkbox"/></div>	<p>This option demonstrates that the agent is ready to make and receive calls. This checkbox needs to be selected for the user to use Call Center Studio.</p> <p>Note: This is not a mandatory field. A user can not make or receive calls if this box remains unchecked.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">System Administrator <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the System Administrator tab.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">User Manager <input type="checkbox"/></div>	<p>If this option is checked, the user will have the authority to manage other users’ information and observe their progress. Note: This option is recommended for Supervisors.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">Supervisor <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the Supervisor tab.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">Agent <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the Agent tab.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">Reporting <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the Reporting tab.</p>
<div style="background-color: #f0f0f0; padding: 5px; display: inline-block;">Quality Control <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the Quality Control tab.</p>

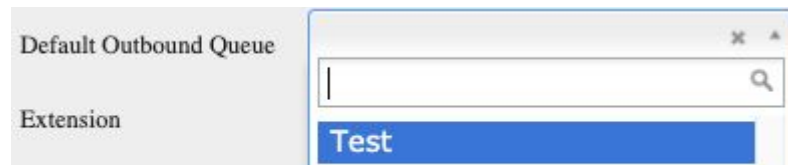
<div>Custom Application Use <input type="checkbox"/></div>	<p>If this option is checked, the user will have the authority to use third-party integrations.</p>
<div>Extension Screen <input type="checkbox"/></div>	<p>If checked, the user will have access to an extension screen that works similar to an IP Phone, used to answer calls. Can only be selected if the agent checkbox is left unchecked.</p>
<div>Operator Console <input type="checkbox"/></div>	<p>If this option is checked, the user will have access to the Operator Console.</p>
<div>Only Use IP Phone <input type="checkbox"/></div>	<p>This option is only for telephone usage instead of the softphone located in the Agent Module.</p> <p><i>Note 1: Checking this box means that the Agent Screen will not be used. Only an IP Phone will be used to make and receive calls.</i></p> <p><i>Note 2: It can only be selected if the agent checkbox is left unchecked.</i></p> <p><i>Note 3: If this option is selected, the extension screen option will be selected by default.</i></p>
<div>Use IP Phone <input type="checkbox"/></div>	<p>This option is for IP Phone users.</p>
<div>Enable IP Restriction <input type="checkbox"/></div>	<p>Restricts access to the system based on IPs mentioned in the Allowed Address section below. When checked, a separate address can be used to log in. Below this check is the “Allowed Addresses” input box, type the desired address.</p>

-
8. Click the “Allowed Addresses” input box, type the allowed addresses in the layout shown below:



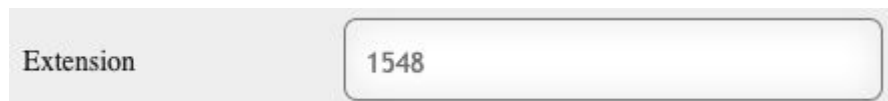
A screenshot of a user configuration form. It shows a label 'Enable IP Restriction' with a checked checkbox. Below it, the label 'Allowed Addresses' is next to a text input box containing the IP address '94.102.35.2'.

9. Click the desired “Default Outbound Queue”, from the dropdown list. If done correctly, the selection will look like the picture below:



A screenshot of a user configuration form. It shows a label 'Default Outbound Queue' next to a dropdown menu. The dropdown is open, showing a search bar and a list of options, with 'Test' selected and highlighted in blue. Below the dropdown, the label 'Extension' is visible.

10. This option defines an extension number for the user within the system. Click the “Extension” input box, type the extension in the layout shown below:



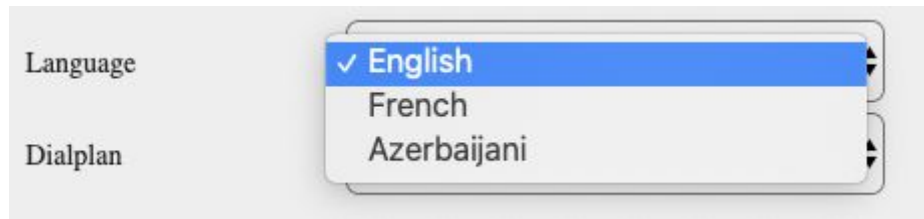
A screenshot of a user configuration form. It shows a label 'Extension' next to a text input box containing the number '1548'.

11. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section. (See **Dialer** Section)



A screenshot of a user configuration form. It shows a label 'Mobile Phone Number' next to a text input box containing the number '1 737 212 98 66'.

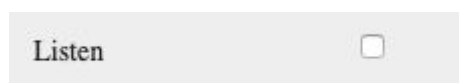
-
12. Click the desired “Language”, from the dropdown list, if down correctly, the selection will look like the picture below:



13. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section.



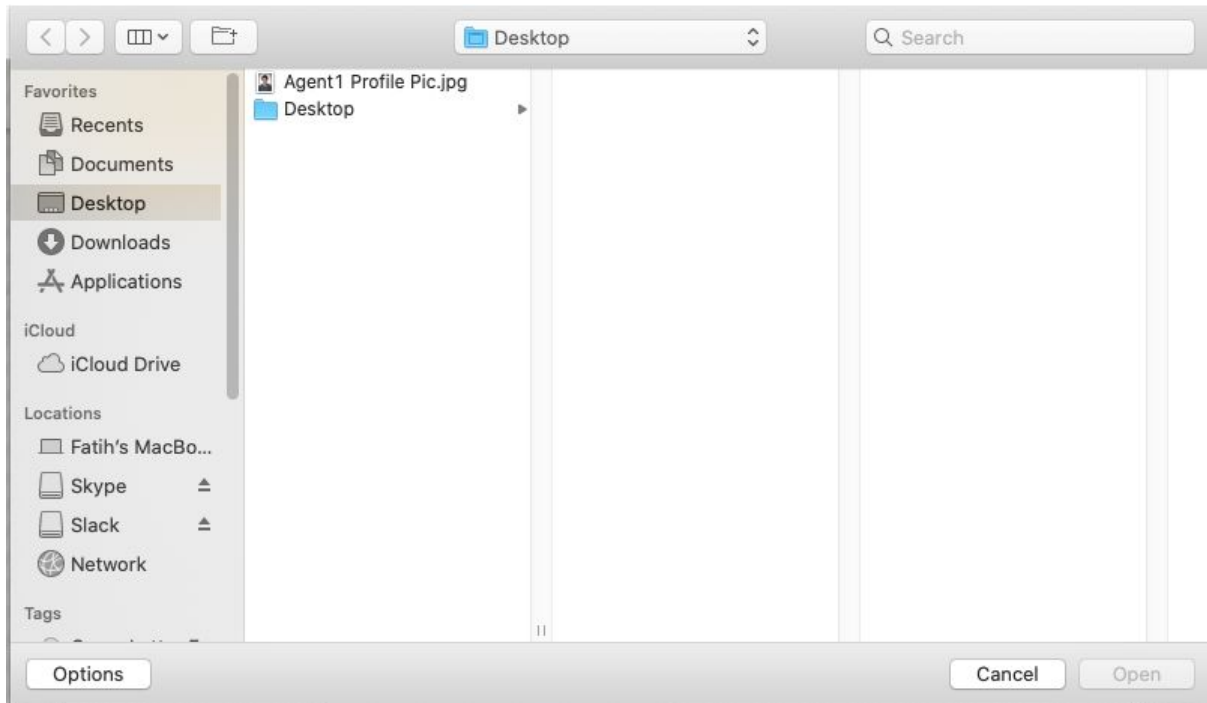
14. Check the following box to be able to listen to the agent on the phone. (Note: If the listen checkbox is not checked, a notification will appear on the supervisor’s screen, stating the supervisor does not have access to listen.



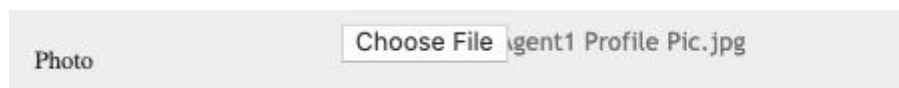
15. Click the following box, based on the gender of the user (If desired):



16. To add the photo of the user, press the choose file button, **Choose File**, if done correctly, the following pop-up window will be displayed:



17. Choose the photo file of the user and then click the open. “Agent1 Profile Pic” file is used here as an example.
18. Once the selection is made, it will look like the picture below.



19. Check the following box to enable the Popup to answer an incoming call for a related user:



20. Click the “Birthday” input box, choose the birthday of the user in the layout shown below:



Birthday: 1990-05-02

Hide From Directory

Custom ID

Queue modification is not allowed

Hangup Beep

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

21. Check the following box to hide the user from the directory. This function makes the user invisible in the directory.

Hide From Directory ☐

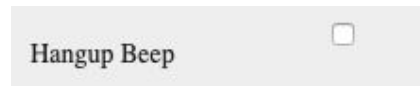
22. Click the “Custom ID” input box, type a unique ID value. An example is shown below:

Custom ID: 12021

23. Check the following box to disable the user to change his/her queue.

Queue modification is not allowed ☐

24. Check the following box to enable a sound notification after the call is hung up in the form of a beep. It helps users to understand when the call is finished.



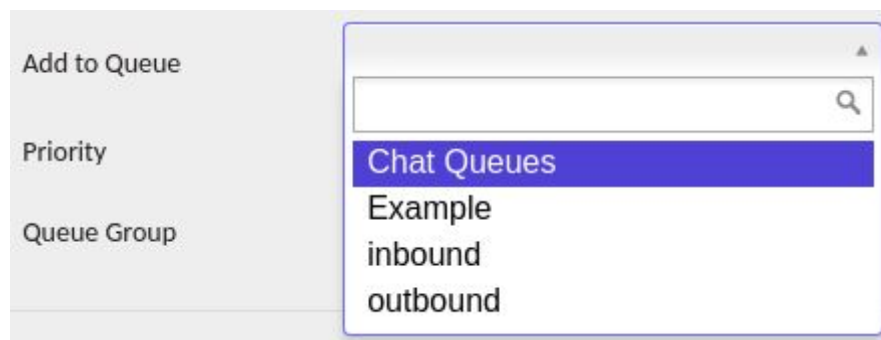
A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Hangup Beep" is displayed in a dark gray font. On the right side of the box, there is an unchecked checkbox.

25. Check the following box to enable the supervisor dashboard function for the related user:



A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Supervisor Dashboard" is displayed in a dark gray font. On the right side of the box, there is an unchecked checkbox.

26. Click the desired “Queue” to add the user in a queue, from the dropdown list. If done correctly, the selection will look like the picture below:



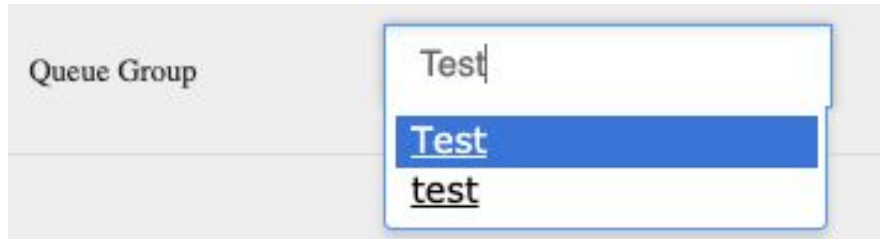
A screenshot of a user interface element. It shows a section with three labels: "Add to Queue", "Priority", and "Queue Group". To the right of these labels is a dropdown menu. The dropdown menu is open, showing a search bar at the top with a magnifying glass icon. Below the search bar, there are four options: "Chat Queues" (highlighted in blue), "Example", "inbound", and "outbound".


27. Click the “Priority” input box, type priority value in the layout shown below. When the call comes, it will go to the user, which has the highest priority number (100 is the highest) in the queue. If that user is not available, the call goes to the next user respectively, who has the second-largest priority number:

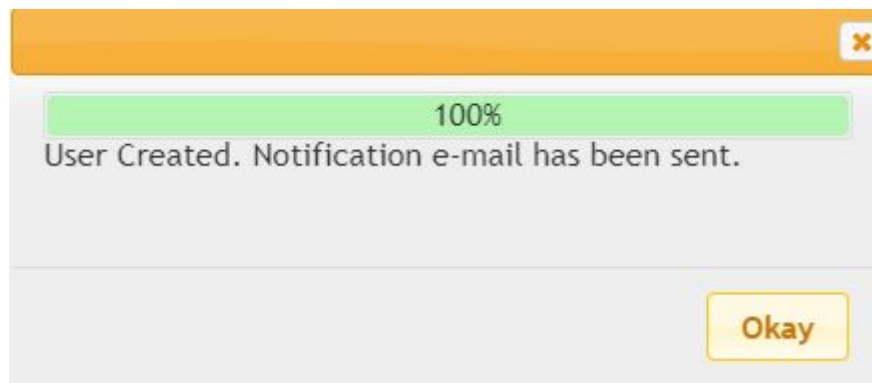



A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Priority" is displayed in a dark gray font. On the right side of the box, there is a text input field containing the number "100".

-
28. Click the desired “Queue Group” to add the user in a queue group, from the dropdown list. If down correctly, the selection will look like the picture below:



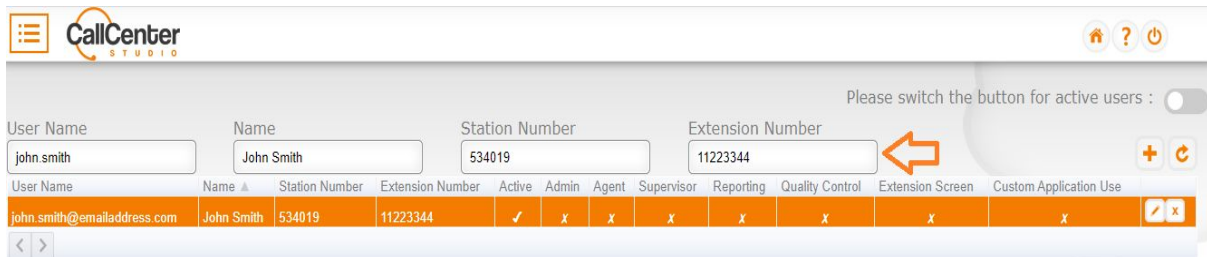
29. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



30. Click the Okay button, , to acknowledge the addition. A notification email will also be sent to the provided address to inform the user.

Searching For Users

There are 4 possible ways to search for users:



Please switch the button for active users : ☐

User Name	Name	Station Number	Extension Number	Active	Admin	Agent	Supervisor	Reporting	Quality Control	Extension Screen	Custom Application Use
john.smith@emailaddress.com	John Smith	534019	11223344	✓	x	x	x	x	x	x	x

1. Searching via Email

Type the user's registered email address to find the desired user.

2. Searching via Name & Surname

Type the user's Name and Surname to find the desired user.

3. Searching via the Station Number

Type the user's Station Number to find the desired user. Note that the Station Number is formed within the system and is provided while adding a user. (See [Adding a User](#) Section)

4. Searching via the Extension Number

Type the user's Extension Number to find the desired user.


Example: John's Station Number was set as 11223344, so this number can be typed as shown below:



Allowed Addresses	<input type="text"/>
Extension	<input type="text" value="11223344"/>
No Answer Attendant	<input type="text"/> x ▼

Editing a Users

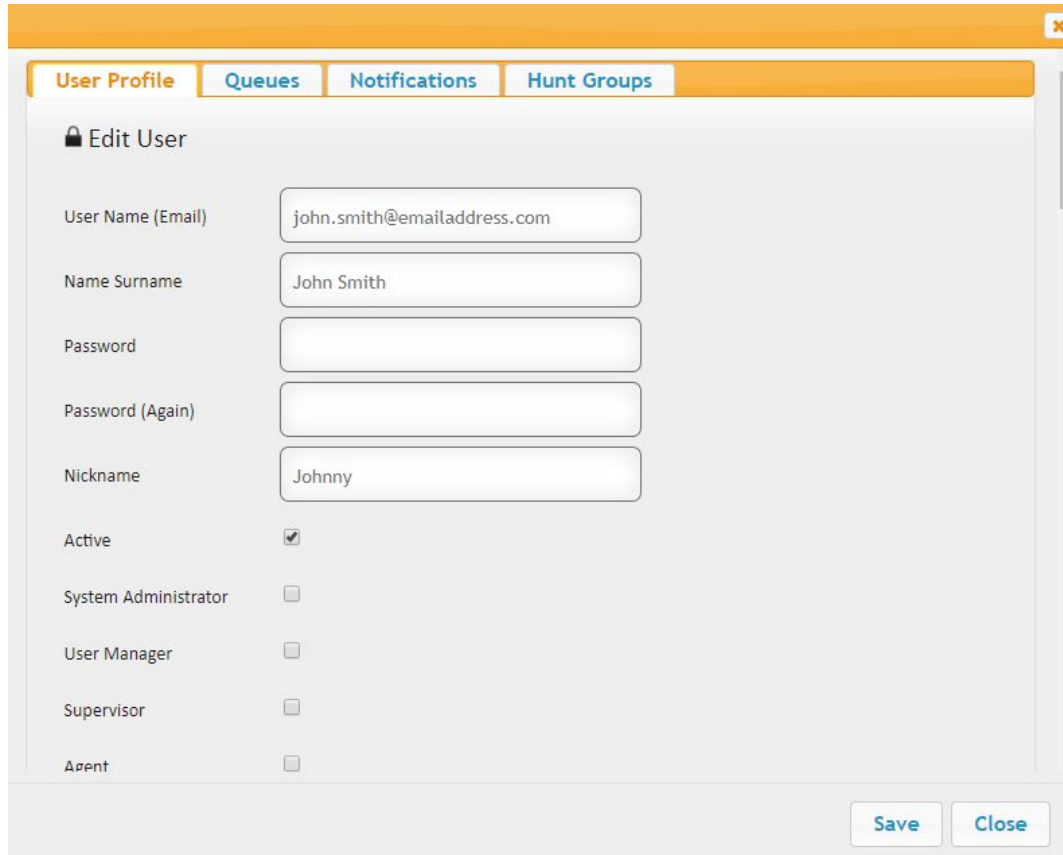
After a new user is added, the edit button can be used. When the edit button is pressed, a pop-up appears, allowing the user to change the access levels and update additional information.

1. To edit a user, click the edit button, , located on the far right of the Users Name as shown below:



*Right next to the edit button, the delete button is also evident. (See **Deleting a User Section**).*

2. After pressing the edit button, the following pop-up appears:



3. As evident in the picture above, 4 tabs are available in this pop-up, which are:
- *User Profile*
 - *Queues*
 - *Notifications*
 - *Hunt Groups*

User Profile Tab

This tab is commonly used to update any sort of information of a user. Here, permissions of users can be managed and changed. Moreover, dial plan and languages can be selected, as well as various other options. All of these options are evident below:

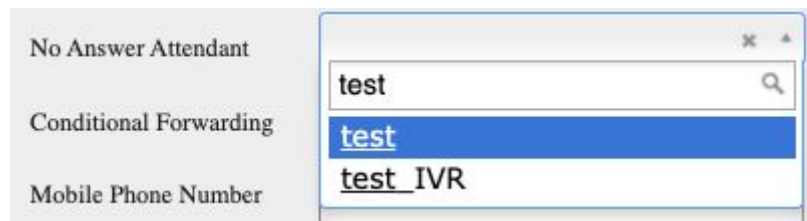
1. All of the input boxes mentioned above in the “Adding a User” section can be changed.
2. In addition to the input boxes, the following information also can be changed:
 - a. Check the following box to enable the user to listen to his/her own recorded calls.

Listen My Own Calls ☐

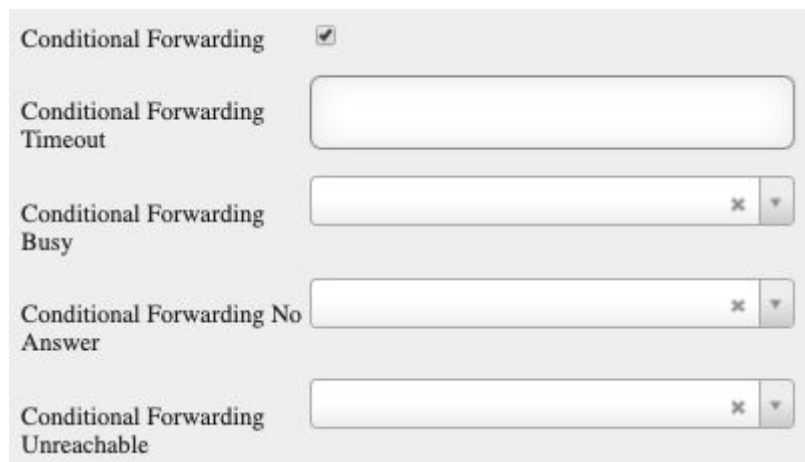
- b. Check the following box, to enable the user to view the blacklist.

View Blacklist ☐

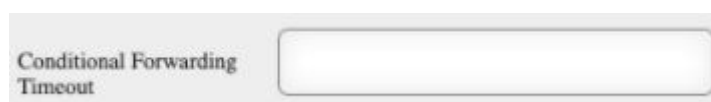
- c. Users can have his/her own IVR. Here it can be selected after creating a new one in the IVR section. Click the desired “No Answer Attendant” to add an IVR for no answering, from the dropdown list. If done correctly, the selection will look like the picture below.



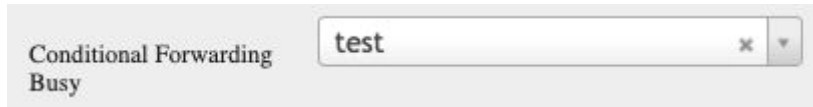
- d. Click the “Station Number” input box, the following input box and dropdown lists will appear. If the user needs an IP phone and wants to use individual announcements, the conditional forwarding function can be used.

A screenshot of a web interface showing the 'Conditional Forwarding' section. The section is titled 'Conditional Forwarding' and has a checked checkbox. Below the title, there are four input fields with labels: 'Conditional Forwarding Timeout', 'Conditional Forwarding Busy', 'Conditional Forwarding No Answer', and 'Conditional Forwarding Unreachable'. Each input field has a search icon and a dropdown arrow.

- Type the conditional forwarding timeout duration in the following input box shown below:

A screenshot of a web interface showing the 'Conditional Forwarding Timeout' input field. The field is a text box with a search icon and a dropdown arrow.

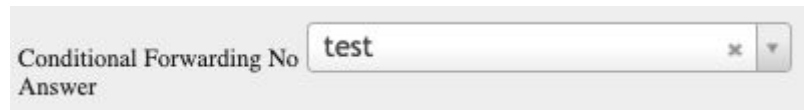
-
- Click the desired individual announcement for the “busy” situation from the dropdown list. If down correctly, the selection will look like the picture below:



Conditional Forwarding
Busy

test x ▼

- Click the desired individual announcement for the “no answer” situation from the dropdown list. If down correctly, the selection will look like the picture below:



Conditional Forwarding No
Answer

test x ▼


- Click the desired individual announcement for the “unreachable” situation from the dropdown list. If down correctly, the selection will look like the picture below:



Conditional Forwarding
Unreachable

test x ▼

- e. Click the “Station Number” input box, type the station number which is automatically given by the system to use when creating a user on an IP phone, in the layout shown below:



Station Number

497320

- f. Click the “Station Password” input box, type the station number that will be used for configuration in the layout shown below:



A screenshot of a configuration interface. On the left, the text "Station Password" is displayed. To its right is a text input box containing the alphanumeric string "eb330AtGH3".

- g. Click the desired “Mobile Client DNIS” to add the mobile client DNIS number from the dropdown list. If done correctly, the selection will look like the picture below:



A screenshot of a configuration interface. On the left, the text "Mobile Client DNIS" is displayed. To its right is a dropdown menu that is open, showing a search bar and two options: "442033183175" and "447588709661". The first option is highlighted with a blue background.

- h. Check the following box, to enable the Mobile Client Login.



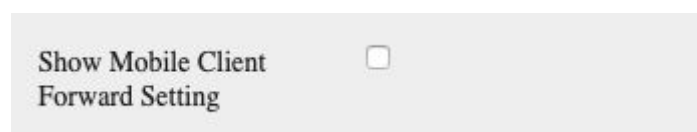
A screenshot of a configuration interface. The text "Mobile Client Login" is displayed next to an unchecked checkbox.

- i. Check the following box, to enable the Mobile Client Forward.



A screenshot of a configuration interface. The text "Mobile Client Forward" is displayed next to an unchecked checkbox.

- j. Check the following box to enable the user to see the mobile client forward setting.

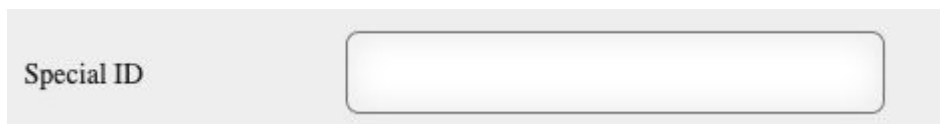


A screenshot of a configuration interface. The text "Show Mobile Client Forward Setting" is displayed next to an unchecked checkbox.

-
- k. Check the following box to show popups on the user's screen when the incoming call comes.

A light gray rectangular button with the text "Incoming Call Popup" on the left and a small, empty square checkbox on the right.

- l. Click the “Special ID” input box, type the special ID of the user in the layout shown below:

A light gray rectangular area containing the text "Special ID" on the left and a white rectangular input box with a thin gray border on the right.


- m. Check the following box to disable the supervisor from making calls.

A light gray rectangular button with the text "Supervisor Softphone Disabled" on the left and a small, empty square checkbox on the right.

Note: Disables supervisor from listening to agent calls. No notification will appear stating they do not have access.

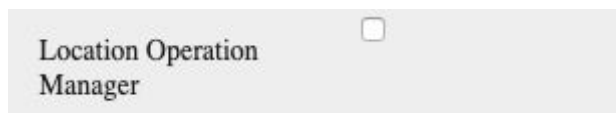
- n. When the “Reject Transfer to Last User” checkbox is selected, if an IVR tree has been set up for transferring to the last user, this user will not be connected with the customer since this box is checked.

-
- o. The Custom Field input boxes are used with third-party integrations. For more info, please contact the assigned Call Center Studio Program Manager.




A screenshot of a user configuration form. It contains two checkboxes: 'Supervisor Softphone Disabled' and 'Reject Transfer To Last User'. Below these are three text input fields labeled 'Custom Field 1', 'Custom Field 2', and 'Custom Field 3'.

- p. Check the following box to authorize the user as a location operation manager.



A checkbox labeled 'Location Operation Manager'.

- q. Click the desired “Location” to select the location operation from the dropdown list. If down correctly, the selection will look like the picture below:

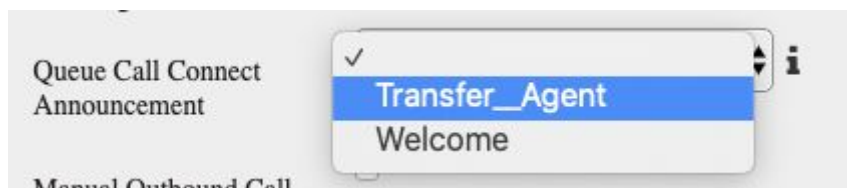


A screenshot of a dropdown menu for the 'Location' field. The dropdown is open, showing a search bar and a list of items. The item 'test' is highlighted in blue.

-
- r. Check the following box to exclude a user from the Number Masking feature.



- s. Select the desired announcement from the “Queue Call Connect Announcement” dropdown list. The announcement will play when the call is connected to a queue. Note: this will increase ringing status duration. Also, Queue Settings must allow agent announcements. If done correctly, the selection will look like the picture below:

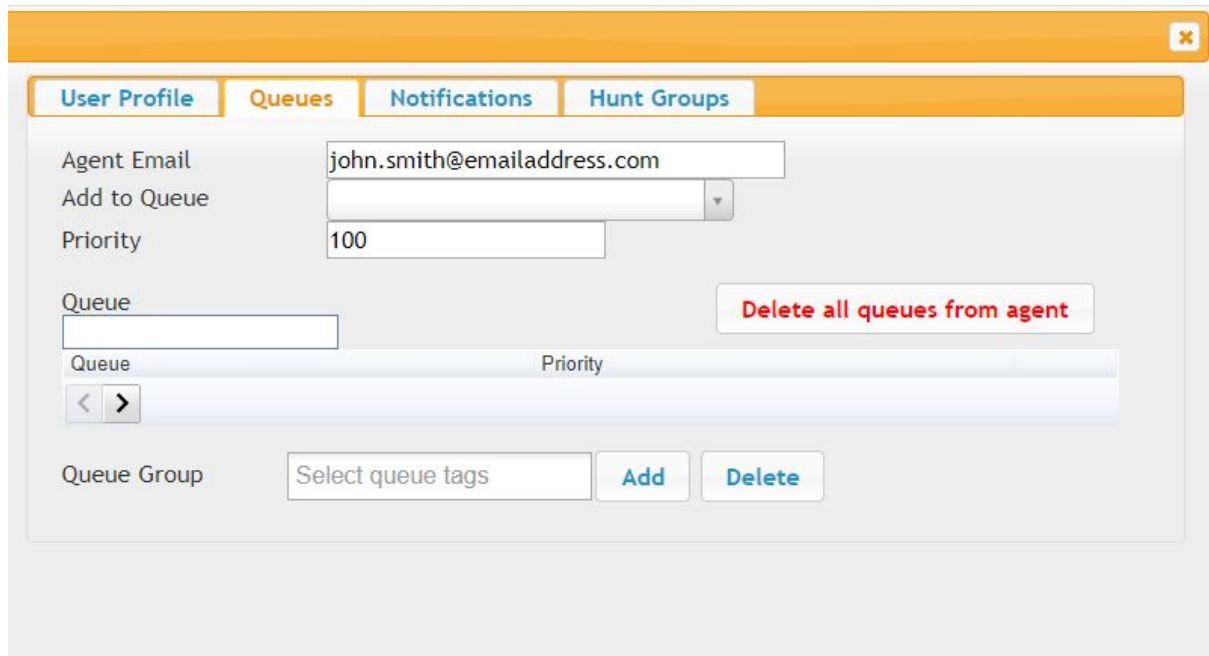


- t. Check the following box to disable the user from outbound calls that can be done manually.



Queues Tab

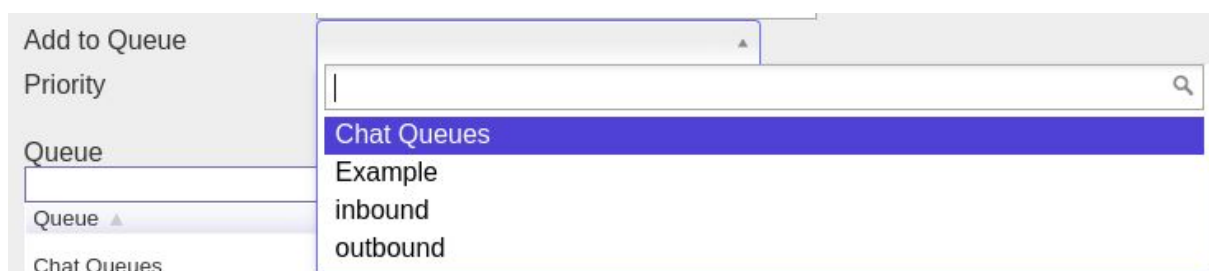
This tab is used to add the desired agent/user to a defined queue. (See [Queues](#) Section)



1. Since we are editing John Smith, his email address is evident in the related field.



2. As you can see underneath the Agent Email, additions can be made to the queue (Such as adding more queues to a specific user - (See [Queues](#) Section)



3. In most cases, the Priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the Priority value is set as 100 for John, meaning he will be the first one to receive an inquiry within a defined queue.

Priority	<input type="text" value="100"/>
----------	----------------------------------

4. 'Queue' Box allows the user to type the name of a queue manually.

Queue	<input type="text"/>
-------	----------------------

5. Delete all queues from the agent' button is located right next to it, allowing the user to pull the agent out of all the defined queues.


Delete all queues from agent

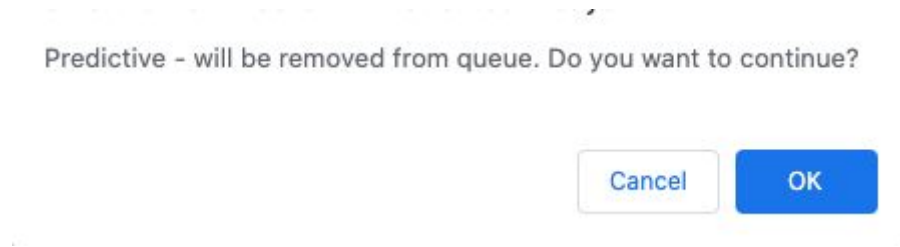
6. Added queues and priority levels can be seen here.




Queue ▲	Priority	
Inbound	<input type="text" value="100"/>	<input type="button" value="x"/>
Outbound	<input type="text" value="100"/>	<input type="button" value="x"/>

< >

Delete a Queue

1. To delete queues from the user, click the delete button . When the delete button is clicked, the following pop-up will appear, an example is shown below:

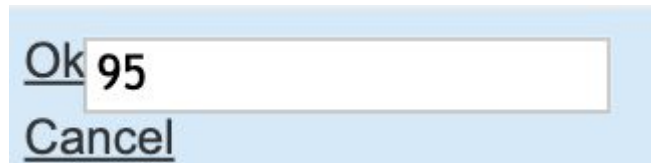


- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

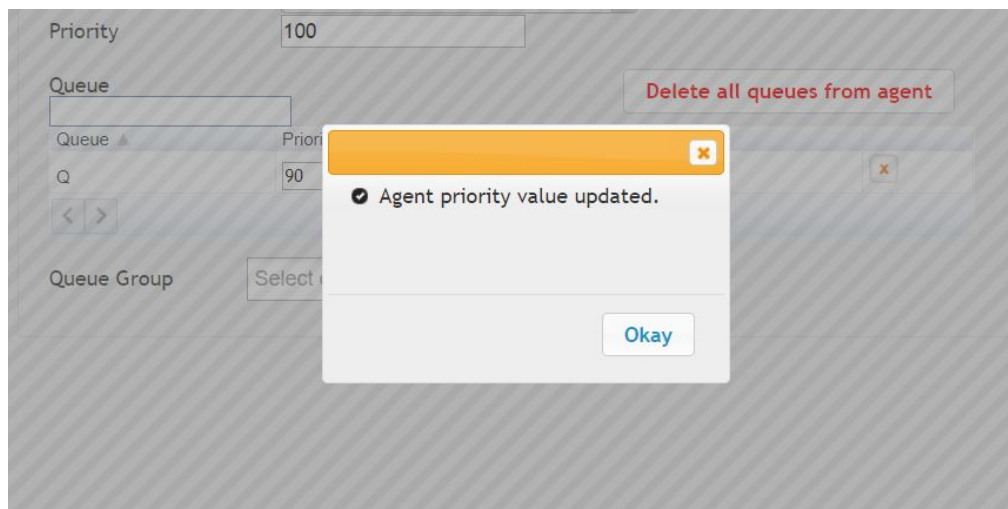
The screen will reload, and the deleted queue will not be shown.

Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in the adding a user section.



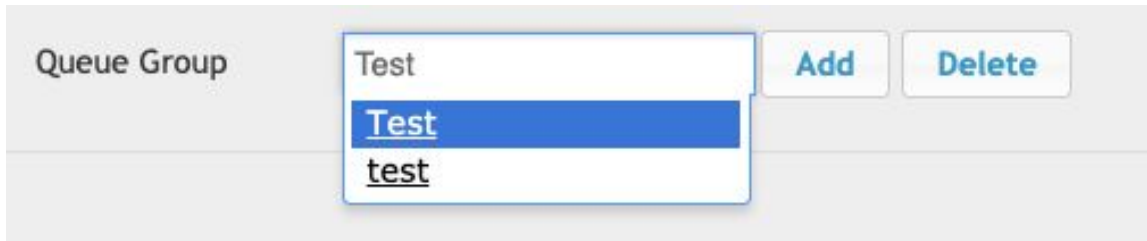
2. Click the Ok button, **Ok**, to acknowledge the additions and to update the priority value.




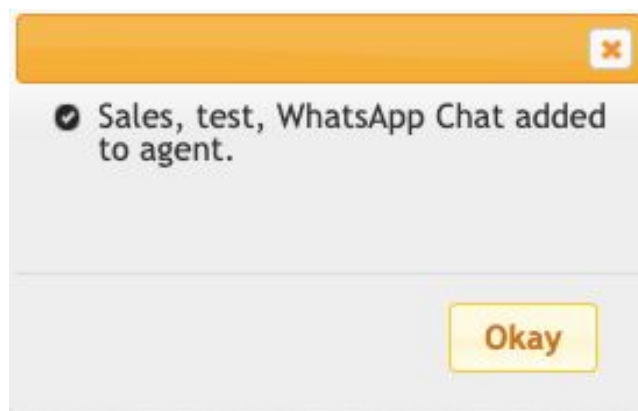
3. Click the cancel button, **Cancel**, to cancel the change.

Adding Queue Group

1. Click the desired “Queue group” to add a new queue group to the user, from the dropdown list,

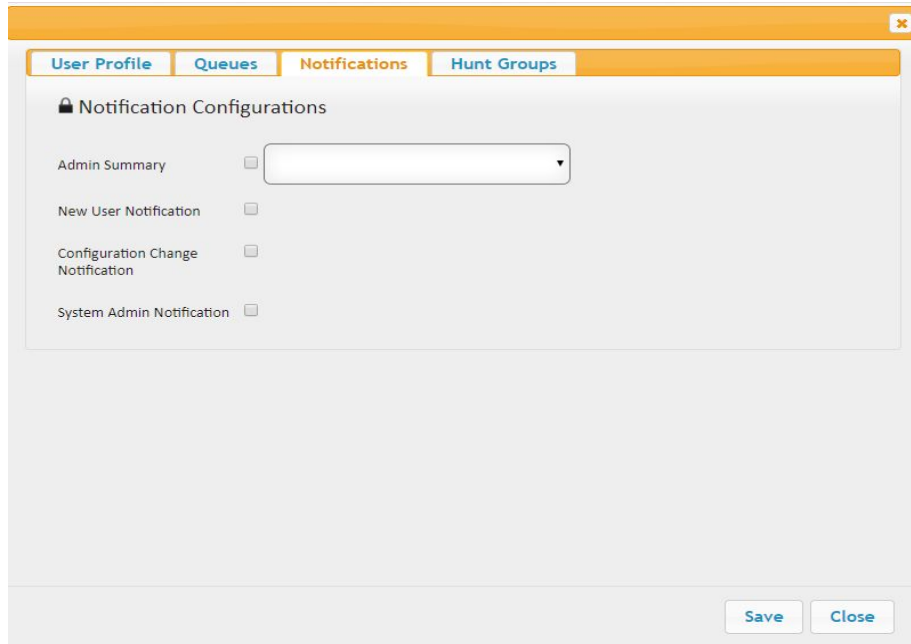


2. Once the queue group is selected, click the Add button, . When the add button is clicked, the following pop-up will appear:



3. Selecting the Okay button, , will confirm the addition.

Notifications Tab



The screenshot shows the 'Users' management window with the 'Notifications' tab selected. The 'Notification Configurations' section contains four items, each with a checkbox and a dropdown menu:

- Admin Summary: ☐ [Dropdown]
- New User Notification: ☐
- Configuration Change Notification: ☐
- System Admin Notification: ☐

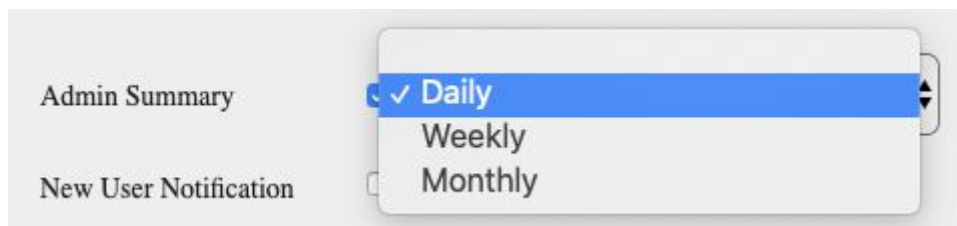
At the bottom right of the window are 'Save' and 'Close' buttons.

Notification Configurations

1. Administrator Summary Report Check Box:

Data can be gathered Daily, Weekly, and Monthly, according to the user's preference.

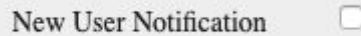
A summary report is sent via email to the defined email address.



This close-up shows the 'Admin Summary' checkbox selected and its dropdown menu open. The menu lists three options: 'Daily' (which is highlighted with a blue bar and a checkmark), 'Weekly', and 'Monthly'.

2. New User Notification Check Box:

A notification email is sent to inform that a new user is created.

A light gray rectangular button with the text "New User Notification" and an unchecked checkbox to its right.**3. Configuration Change Notification Check Box:**

When the following checkbox is selected, if a queue is changed, details regarding the change will be sent to the user.


A light gray rectangular button with the text "Configuration Change Notification" and an unchecked checkbox to its right.**4. System Admin Notification Check Box:**

The “System Admin Notification” checkbox is used to notify the admin of changes to the tenant.

A light gray rectangular button with the text "System Admin Notification" and an unchecked checkbox to its right.



Hunt Groups Tab

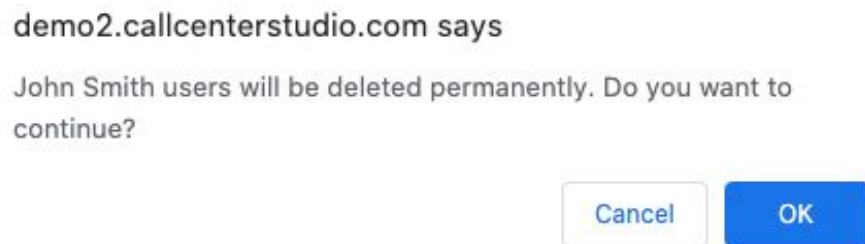
1. Simply allows the user to choose a Hunt Group. (See **Hunt Groups** for a detailed explanation)


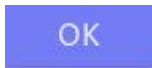

A screenshot of a web application interface for selecting a Hunt Group. It features a search box labeled "Hunt Group" with a dropdown menu below it. The dropdown menu shows "Hunt Group ▲" and a single item "151545487" highlighted in orange. Below the dropdown are two small navigation buttons, "<" and ">".

Hunt Group
Hunt Group ▲
151545487

Deleting a Users

1. From the “Users” main page, click the delete button, , to the right of the edit button, , to remove a user. When the delete button is clicked, the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
 - Selecting the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .
- The screen will reload, and the deleted user will not be shown.

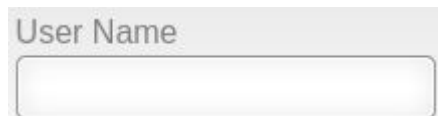
Searching for a User

There are four ways to search for a user.

- *Username*
- *Name*
- *Station Number*
- *Extension Number*

Username

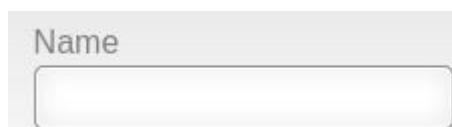
1. Click the “Username” input box, type the desired Username. The input box is shown below:

A screenshot of a web interface showing a search input box. The box has a light gray background and a rounded rectangular border. The text "User Name" is displayed in a small, gray font at the top left of the box. Below the text is a white rectangular input field.

Note: Partial names can be used when spelled correctly.

Name

1. Click the “Name” input box, type the desired name. The input box is shown below:

A screenshot of a web interface showing a search input box. The box has a light gray background and a rounded rectangular border. The text "Name" is displayed in a small, gray font at the top left of the box. Below the text is a white rectangular input field.

Note: Partial names can be used when spelled correctly.

Station Number

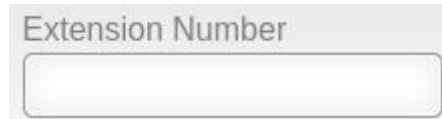
1. Click the “Station Number” input box, type the desired station number. The input box is shown below:

A screenshot of a web form element. It consists of a light gray rectangular box with the text "Station Number" in a dark gray font at the top left. Below the text is a white rectangular input field with a thin gray border and rounded corners.

Note: Partial names can be used when spelled correctly.

Extension Number

1. Click the “Extension Number” input box, type the desired extension number. The input box is shown below:

A screenshot of a web form element. It consists of a light gray rectangular box with the text "Extension Number" in a dark gray font at the top left. Below the text is a white rectangular input field with a thin gray border and rounded corners.

Note: Partial names can be used when spelled correctly.

Incoming Calls




Interactive Voice Responses (IVRs) registered in the system are displayed and routed to the appropriate number. (See the ***Attendants*** section for additional information about IVRs). Here IVR rules can be sent instead of creating working hour constraints within the IVR itself.

Incoming Calls		Dialed Numbers (DNIS)		Interactive Voice Response						
Incoming Calls	Interactive Voice Response ▲	Start Date	Start Time	Finish Date	Finish Time	Dialed Numbers (DNIS)	Day of the Week	Default	New	
15125721001	Demo_IVR					15125721001		✓	✎ ✕	
442033183175	Demo_IVR					442033183175		✓	✎ ✕	

To update a defined Inbound Call, users must click the edit button, ✎. Both buttons (add & edit) results in the pop-up of the same window, which is indicated below:





Adding an Incoming Call


1. Click the add button,  , located at the top right of the page.

Incoming Calls

Dialed Numbers (DNIS)

Interactive Voice Response


Incoming Calls	Interactive Voice Response ▲	Start Date	Start Time	Finish Date	Finish Time	Dialed Numbers (DNIS)	Day of the Week	Default	New
15125721001	Demo_IVR					15125721001		✓	 
442033183175	Demo_IVR					442033183175		✓	 

 **Edit Incoming Call**

Incoming Calls

Dialed Numbers (DNIS)

Interactive Voice Response



Date

Start Time

Finish Date

Finish Time


Days of week

☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday

Default

☐


Location



2. **Incoming Calls:** Click the “Incoming Calls input box, type the desired name - an example is shown below:

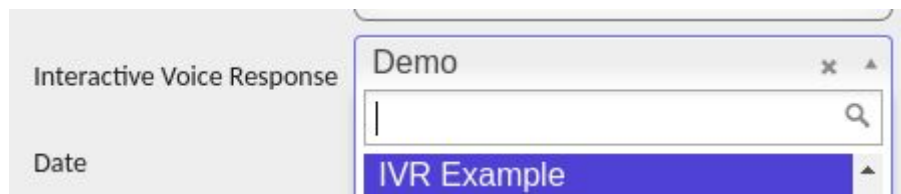
Incoming Calls

3. **Dialed Number (DNIS):** A phone number that is used to reply to calls. Click the “Dialed Number (DNIS) input box, type the desired number - an example is shown below:



Dialed Numbers (DNIS)

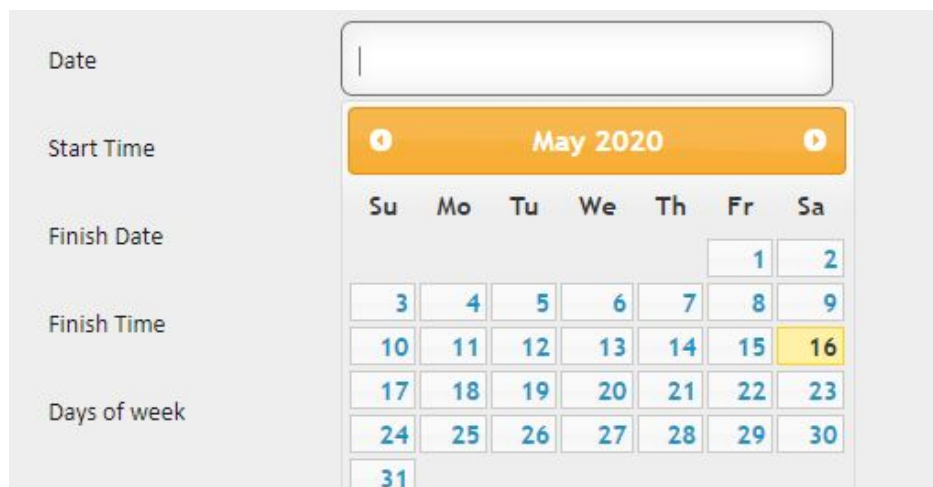
4. **Interactive Voice Response:** A welcome menu (IVR) previously defined in the system is selected here. Click the “Interactive Voice Response box, and choose the desired IVR - an example is shown below: (See [Attendants](#) section for additional information about IVRs)



Interactive Voice Response

Date

5. **Date:** Used to route to different welcome menus within a defined period. Select the desired day.



Date

Start Time

Finish Date

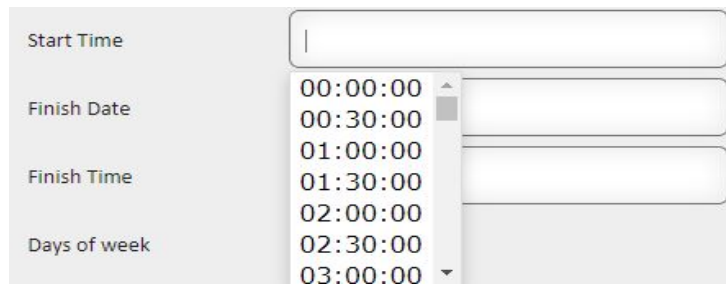
Finish Time

Days of week

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

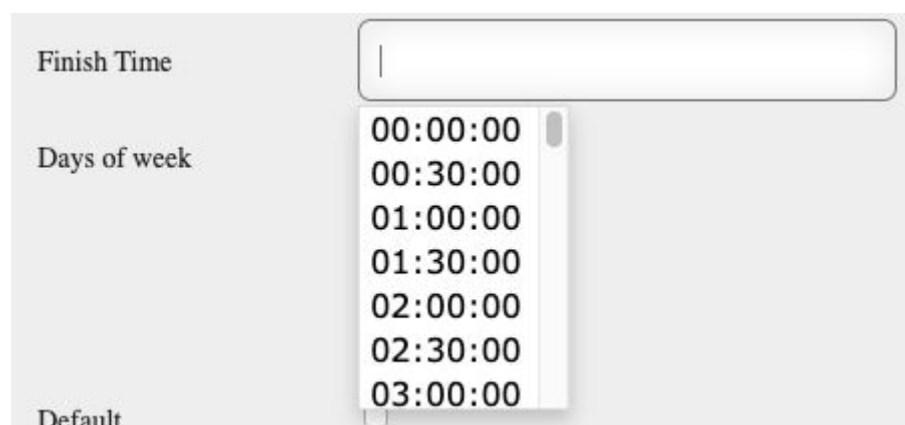
6. **Start Time:** Denotes the starting period using half-hour increments.



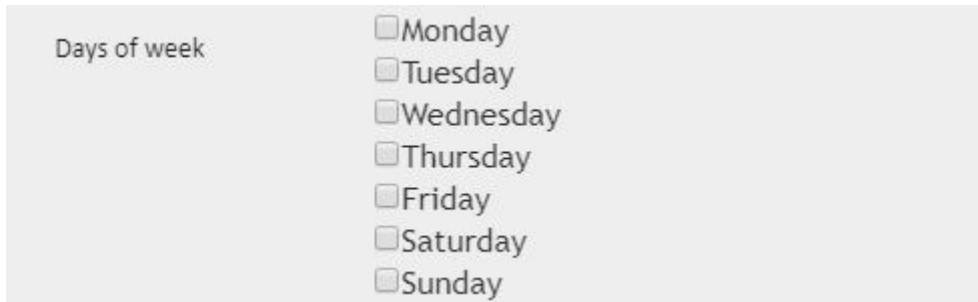
7. **Finish Date:** Termination date of the desired incoming call rule.



8. **Finish Time:** Denotes ending period in half-hour increments.



9. **Days of Week:** Used for regular operations on selected days of the week. For instance, if Monday-Wednesday-Friday were selected, that specific call would be routed to the defined IVR on those days.


A screenshot of a user interface for selecting days of the week. On the left, the text "Days of week" is displayed. To the right, there is a vertical list of days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Each day is preceded by an unchecked checkbox.

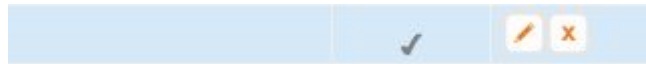
10. **Default:** Can be used when no particular date, hour, and days of week criteria are determined. (Only one default can be used per IVR, multiple incoming calls rules can be set up per IVR,).

A screenshot of a user interface showing two settings. The first setting is labeled "Default" and has a checked checkbox next to it. The second setting is labeled "Location" and has a text input field with a small "x" icon and a dropdown arrow on the right side.

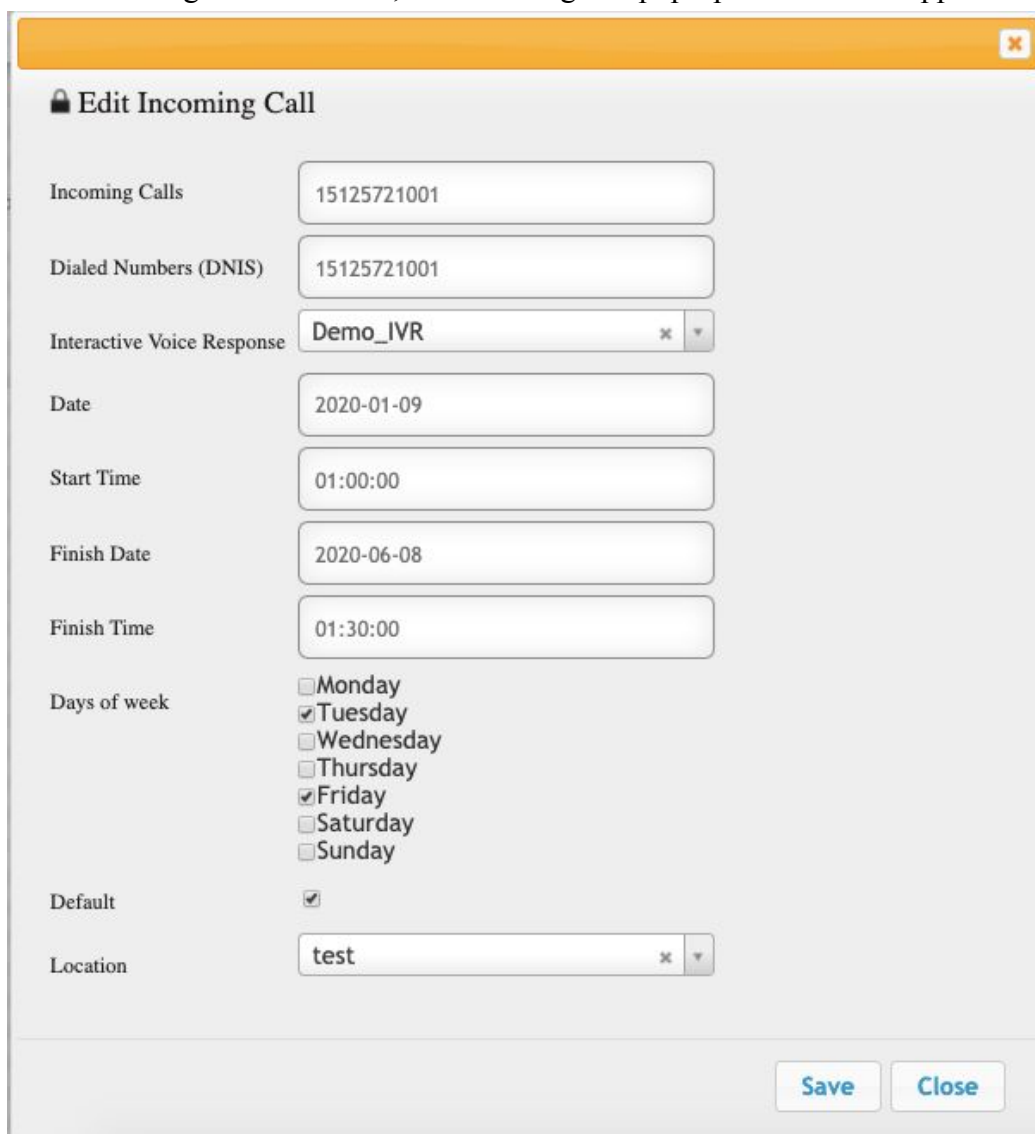
11. **Location:** Used to separate different dial plans according to defined locations. (See the **Location** section for additional information about this part).

Editing an Incoming Call

1. To edit a defined incoming call, click the edit button, , located on the far right of the row as shown below:



2. After clicking the edit button, the incoming call pop-up window will appear as shown.




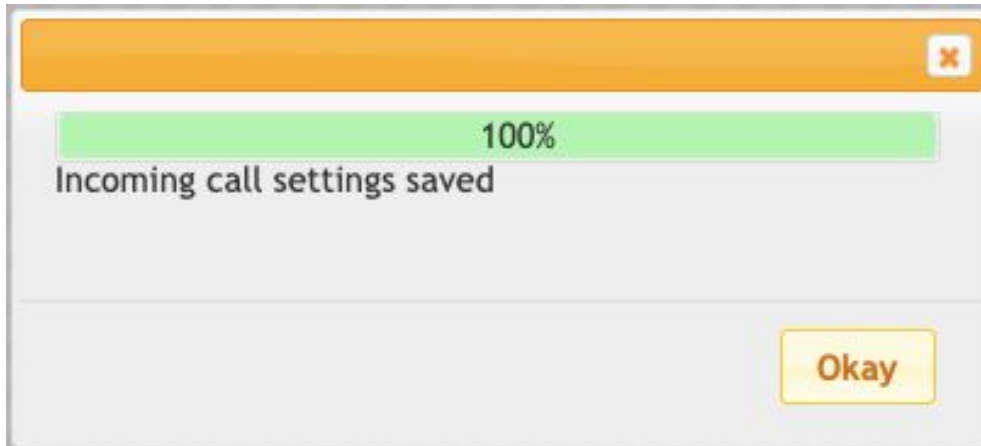
The pop-up window is titled "Edit Incoming Call" and contains the following fields and options:

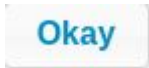
- Incoming Calls:** Text input field containing "15125721001".
- Dialed Numbers (DNIS):** Text input field containing "15125721001".
- Interactive Voice Response:** Dropdown menu with "Demo_IVR" selected.
- Date:** Text input field containing "2020-01-09".
- Start Time:** Text input field containing "01:00:00".
- Finish Date:** Text input field containing "2020-06-08".
- Finish Time:** Text input field containing "01:30:00".
- Days of week:** A list of days with checkboxes: Monday (unchecked), Tuesday (checked), Wednesday (unchecked), Thursday (unchecked), Friday (checked), Saturday (unchecked), and Sunday (unchecked).
- Default:** A checkbox that is checked.
- Location:** Dropdown menu with "test" selected.

At the bottom right of the window are two buttons: "Save" and "Close".



3. Make the change as desired.

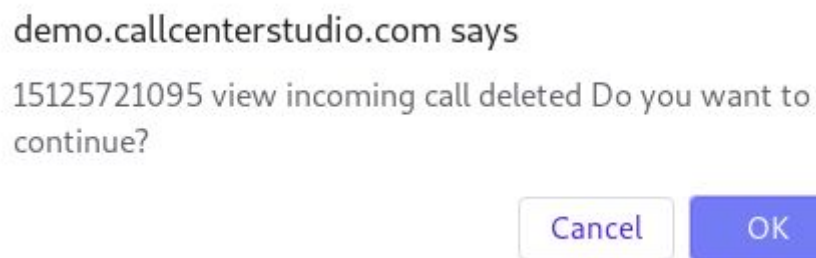
4. Once the desired changes have been completed, the information can be saved by clicking the save button, , the following pop-up box will appear:


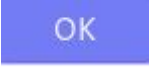
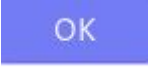


5. Click the Okay button, , to confirm the changes.

Deleting a Defined Inbound Call

1. From the Incoming Calls main page, click the delete button, , to the right of the edit button, , to remove an incoming call. When the delete button is clicked, the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .
- The screen will reload, and the deleted user will not be shown.

Refreshing the Incoming Calls Page

To refreshing the page, click the refresh button,



Searching for an Incoming Call

There are three ways to search for an incoming call.

- Incoming Calls
- Dialed Numbers (DNIS)
- Interactive Voice Response

Incoming Calls

1. Click the “Incoming Calls” input box, type the desired Incoming Call’s name. The input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Incoming Calls" is displayed in a medium gray font. To the right of this text is a white rectangular input field with a thin gray border and rounded corners.

Note: Partial names can be used when spelled correctly.

Dialed Numbers (DNIS)

1. Click the “Dialed Numbers (DNIS)” input box, type the number of the incoming call (DNIS). The input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Dialed Numbers (DNIS)" is displayed in a medium gray font. To the right of this text is a white rectangular input field with a thin gray border and rounded corners.

Note: Partial names can be used when spelled correctly.

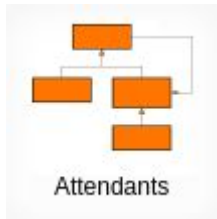
Interactive Voice Response

1. Click the “Interactive Voice Response” input box, type the name of the desired IVR.
The input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Interactive Voice Response" is displayed in a medium gray font. To the right of this text is a white rectangular input field with a thin gray border and rounded corners.


Note: Partial names can be used when spelled correctly.

Attendants



The Attendants screen is where Interactive Voice Response (IVR) trees can be constructed and managed.

Creating an IVR

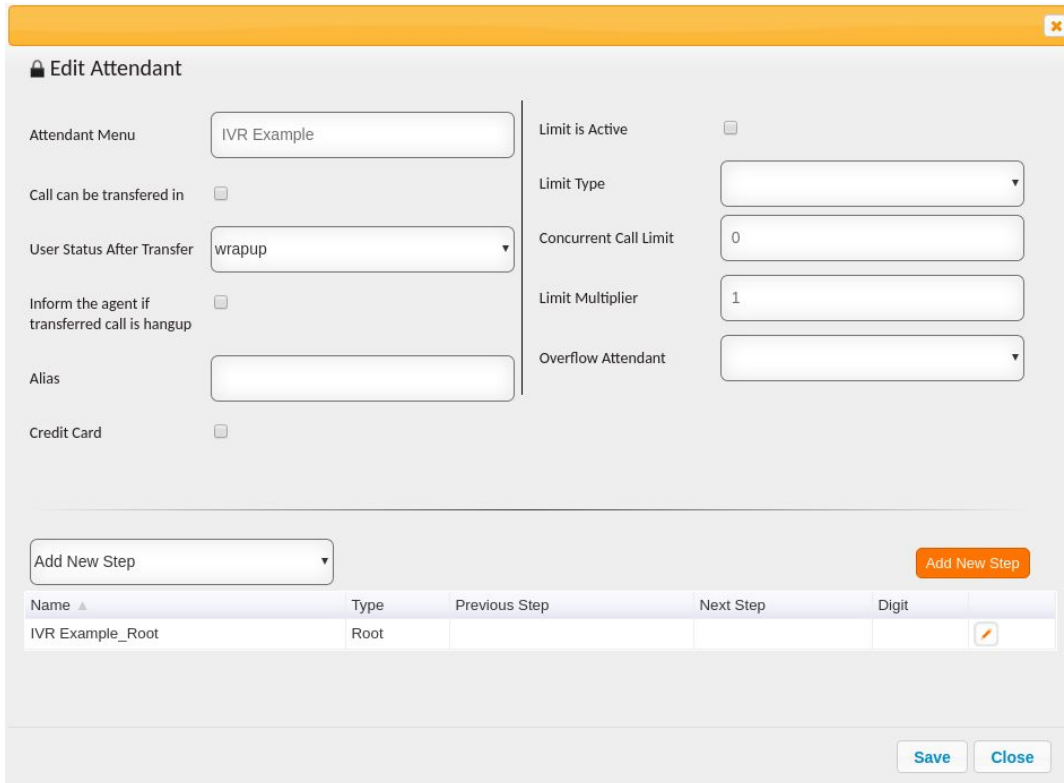
1. Click the new button, , in the top right corner, the following pop-up screen will appear as shown below:



2. Click the Attendant Menu input box, type the desired name of the IVR an example name is shown below:

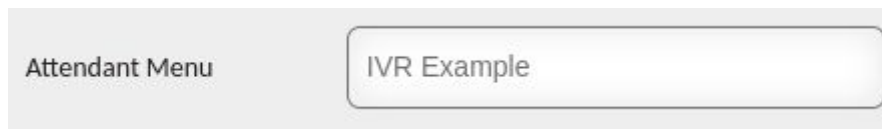


3. Click the save button, , the following screen will appear:

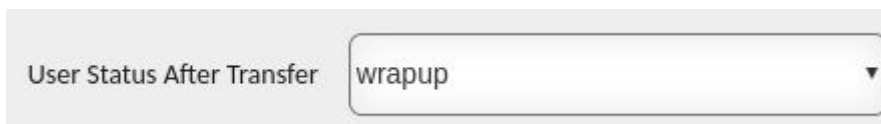


Note: By Default, several things are already set up within the IVR. They are listed below:

The Attendant Menu name is inputted by default, as shown below:



User Status After Transfer is wrapup (allows for a delay, the agent has to reselect the Available status to resume receiving calls) by default, as shown below:




Limit Multiplier is “1” by default (used as a multiplying factor for the “auto based” calculations. For example, if the auto-based calculation determines there are “6” agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of “1” the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is “6”) as shown below:

Limit Multiplier	1
------------------	---

The root step of the IVR tree is displayed in the following format:

“Name assigned to the Attendant”_Root as shown below:

Name ▲	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

- If desired, select the “Calls can be transferred in” checkbox (this allows the agent to transfer to this IVR if desired). The checkbox is shown below:

Call can be transfered in	<input type="checkbox"/>
---------------------------	--------------------------

- If desired, select the “Inform the agent if a transferred call is hangup” checkbox (If this checkbox is selected, it will notify the agent if the customer hung up the call before completing the IVR. For example, if the agent transferred the customer to a satisfaction survey, and the customer hung up before completing the survey. The checkbox is shown below:

Inform the agent if transferred call is hangup	<input type="checkbox"/>
--	--------------------------

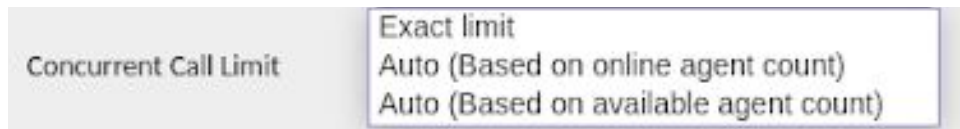
-
6. If desired, an Alias number can be used for the IVR. (Normally used for IP phones so the agent can transfer to an IVR set up for IP phones, but it can also be used in the tenant, by selecting “Internal Transfer” in the Queues section - See more in the queues section)
 7. If desired, the credit card checkbox can be selected (Must be checked when creating an IVR credit card payment step). The checkbox is shown below:

A light gray rectangular button with the text "Credit Card" on the left and an unchecked checkbox on the right.

8. IVR call limits can be set up by selecting the “Limit is Active” checkbox, as shown below:

A light gray rectangular button with the text "Limit is Active" on the left and a checked checkbox on the right.

9. Click the “Limit Type” input box. The following dropdown menu will appear:



The dropdown selections are described below:

Exact Limit	If Exact Limit is selected, please follow steps 10 - 11 to input the exact limit.
Auto (Based on online agent count)	Determines the number of concurrent calls to the IVR based on the online agent count (agent can be in any status) Skip steps 10 - 11.
Auto (Based on available agent count)	Determines the number of concurrent calls to the IVR based on the online available agent count. Skip steps 10 - 11.

10. Click the “Concurrent Call Limit” input box type the desired concurrent call limit. An example is shown below:



-
11. Click the “Limit Multiplier” input box, type the desired limit multiplier (Can only be used for “Auto (Based on online agent count)” and “Auto (Based on available agent count)”):


The image shows a user interface element with a light gray background. On the left, the text "Limit Multiplier" is displayed in a dark gray font. To the right of this text is a white rectangular input box with a thin gray border. Inside the input box, the number "1" is centered.

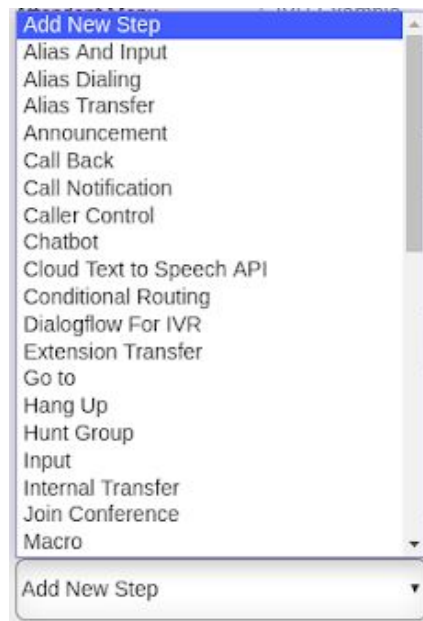
Note: Limit Multiplier is “1” by default (used as a multiplying factor for the “auto based” calculations. For example, if the auto-based calculation determines there are “6” agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of “1” the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is “6”) as shown below:

12. If the Limit is Active checkbox is selected, the “Overflow Attendant” input box must be defined. Click the input box a dropdown list of created IVR’s will be displayed (If no IVR’s are displayed, deselect the “Limit is Active” checkbox, finish following these steps, and create a secondary IVR to be used as the overflow attendant, then edit this IVR and select the “Limit is Active" checkbox and the appropriate IVR.

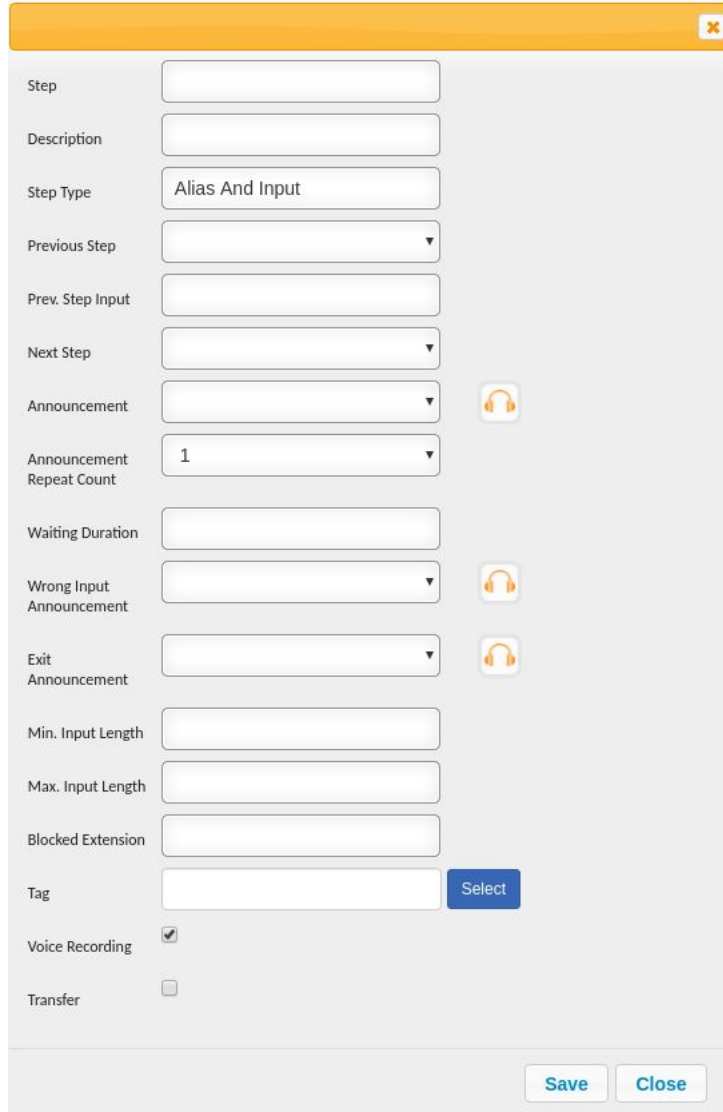
Adding Alias And Input Step

For example, when Alias and Input are added to IVR, The caller will hear an announcement saying, "dial if you know the extension number." If the caller wants to talk to Agent 1 specifically, the caller dials 1001, and the call is forwarded to Agent 1.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Alias And Input” step the following pop-up window will appear:

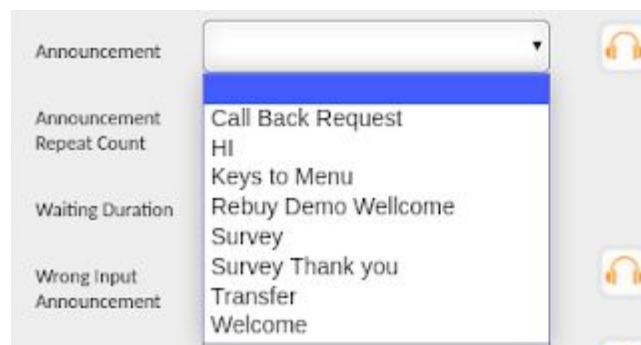



3. Click the “Step” input box, type the desired step name. An example is shown below:



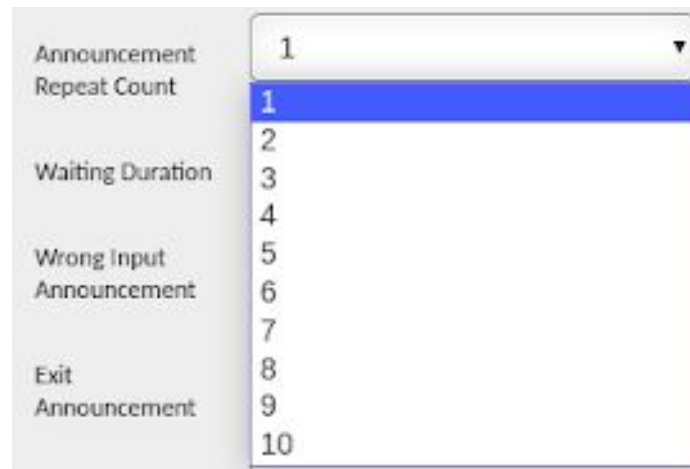
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a form with several input fields. The 'Announcement Repeat Count' field is selected, and a dropdown menu is open, displaying a list of numbers from 1 to 10. The number 1 is currently selected and highlighted in blue. Other fields visible include 'Waiting Duration', 'Wrong Input Announcement', and 'Exit Announcement'.


10. Select the desired repeat count.
11. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

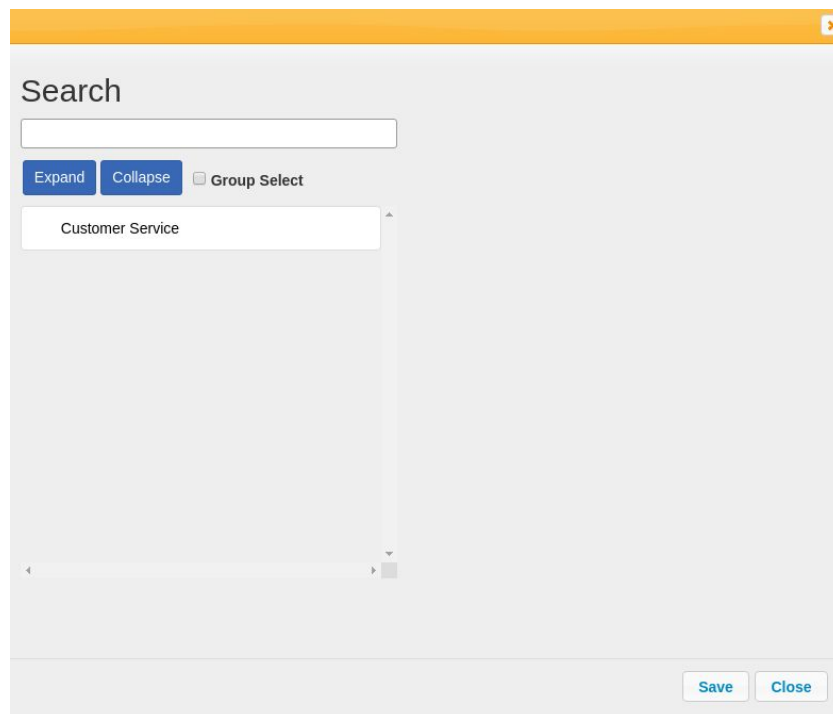


The screenshot shows a form with a 'Waiting Duration' input box. The number '10' is entered into the box.

12. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. Click the “Exit Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
14. Click the “Min. Input Length” input box type the minimum input length, always “1.”
15. Click the “Max. Input Length” input box type the maximum input length for the customer to select. For example, if the Alias’s range between 3 digits and 4 digits, the max. The input length will be 4.

-
16. Select the “Blocked Extension” input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

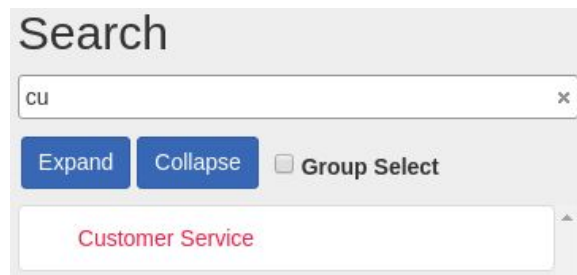
17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



18. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. It features a light gray header with the word "Search" in bold. Below the header is a white input field with a vertical cursor on the left.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of the search interface showing results. The input field contains "cu" and has a close button (x). Below the input are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". A list box below shows a single item, "Customer Service", in red text.

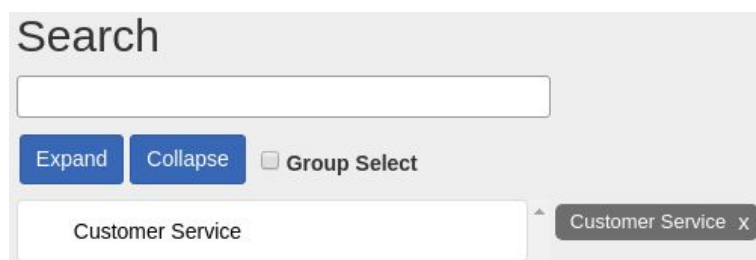
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

A screenshot of the search interface showing results. The input field is empty. Below the input are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". A list box below shows a single item, "Customer Service", in black text. To the right of the list box, a dark gray button with the text "Customer Service" and a close button (x) is visible.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Below the tag's input box, the following two checkboxes are displayed:

A screenshot of two checkboxes. The first checkbox is labeled "Voice Recording" and the second is labeled "Transfer". Both checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

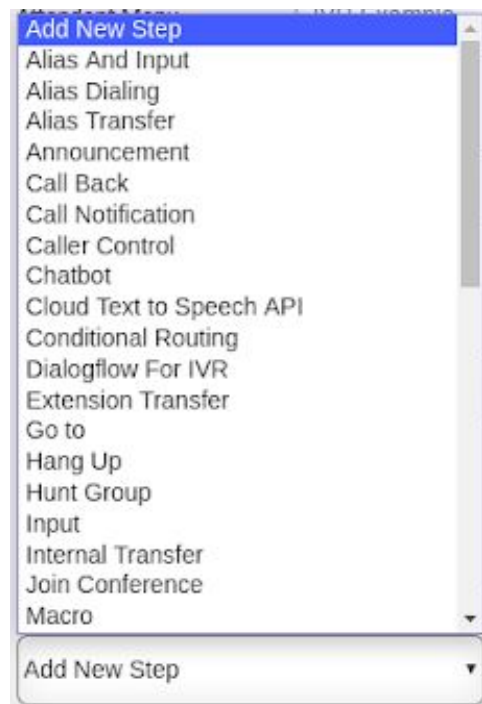
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

20. Click the save button, .

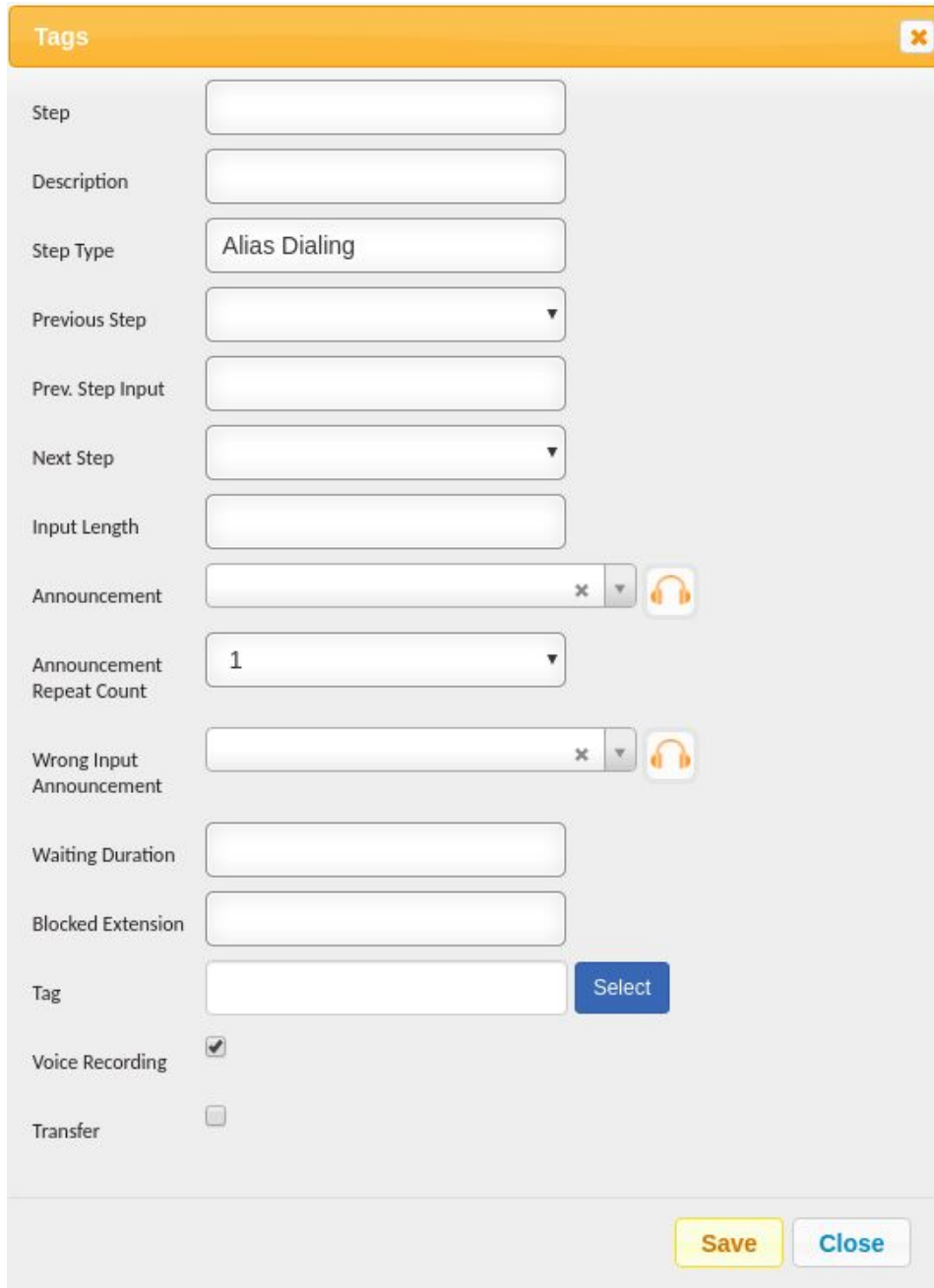
Adding Alias Dialing Step

The step is used to transfer the call to the dialed extension number.


1. Click the “Add New Step” dropdown box, , the following list will appear:



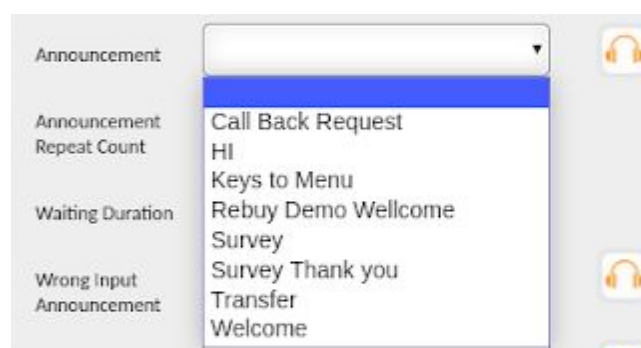
2. Select the “Alias Dialing” step the following pop-up window will appear:




3. Click the “Step” input box, type the desired step name. An example is shown below:

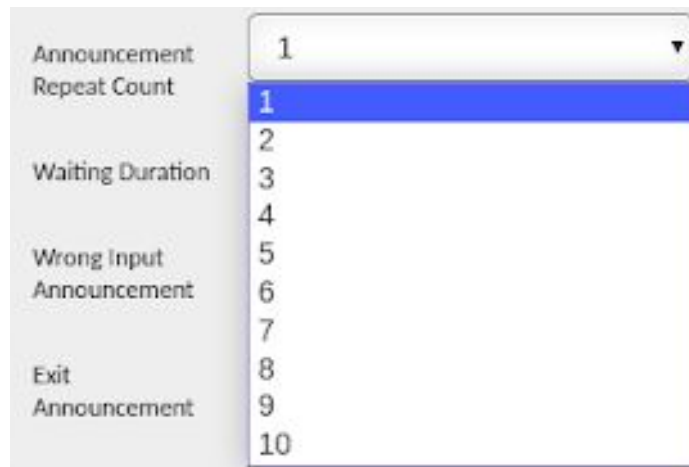


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Input Length” input box, type the desired input length.
9. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.


10. Click the “Announcement Repeat Count” input box, the following dropdown list will appear:

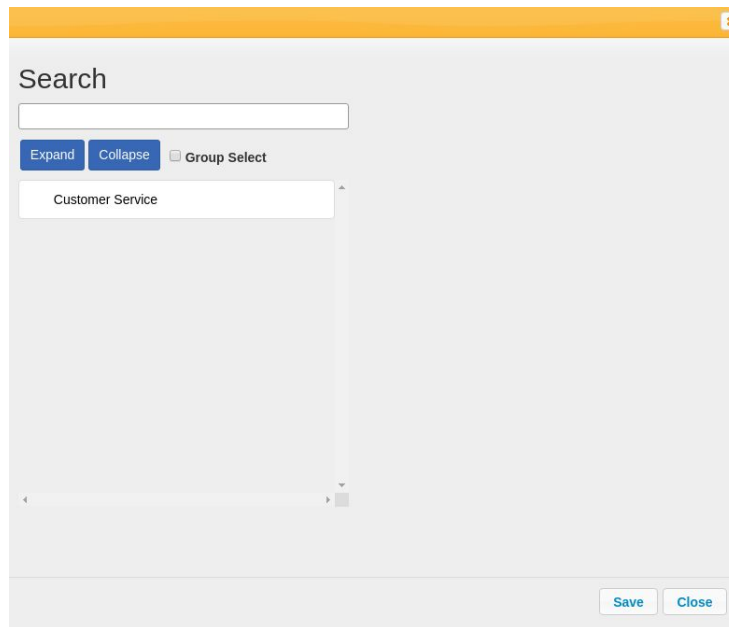
A screenshot of a web form. On the left, there is a vertical list of labels: 'Announcement Repeat Count', 'Waiting Duration', 'Wrong Input Announcement', and 'Exit Announcement'. To the right of these labels is a dropdown menu. The dropdown menu is open, showing a list of numbers from 1 to 10. The number '1' is currently selected and highlighted with a blue background. The dropdown menu has a small downward arrow icon on its right side.

11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. In the “Waiting Duration” input type the waiting duration for customer input (Seconds) an example is shown below:

A screenshot of a web form showing a single input field. The label 'Waiting Duration' is positioned to the left of the input box. The input box contains the number '10'.

13. Select the “Blocked Extension” input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

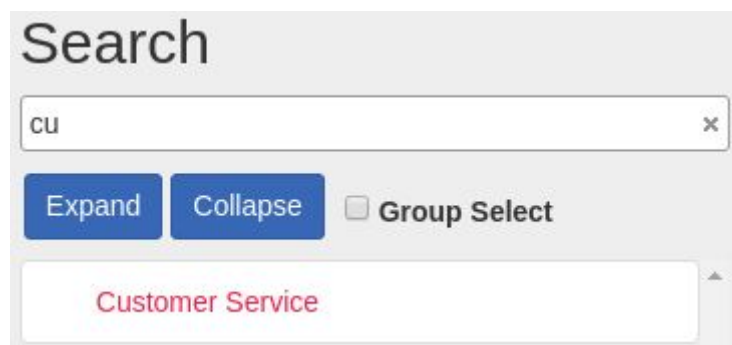
14. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



15. Search for a Tag using the “Search” input box shown below:



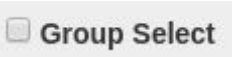
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



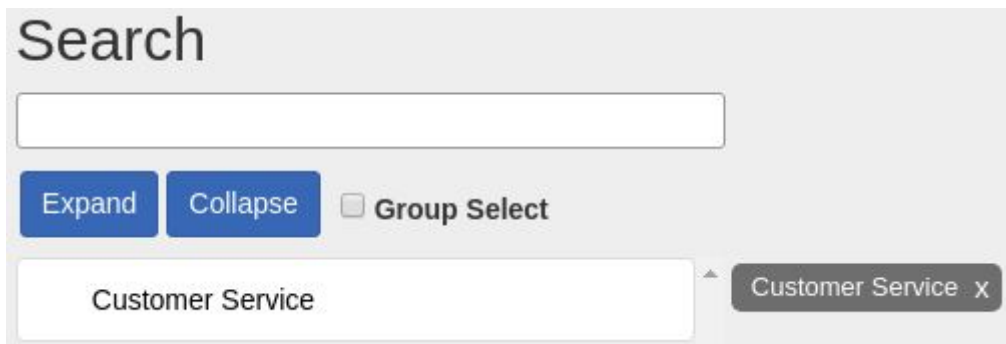
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

The screenshot shows a 'Search' interface. At the top is a search input field. Below it are three buttons: 'Expand' (blue), 'Collapse' (blue), and 'Group Select' (checkbox). Below these buttons is a list box containing the tag 'Customer Service'. To the right of the list box, the tag 'Customer Service' is displayed with a small 'x' icon next to it, indicating it has been selected.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

16. Below the tag's input box, the following two checkboxes are displayed:

A screenshot of two checkboxes in a light gray box. The first checkbox is labeled "Voice Recording" and the second is labeled "Transfer". Both checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

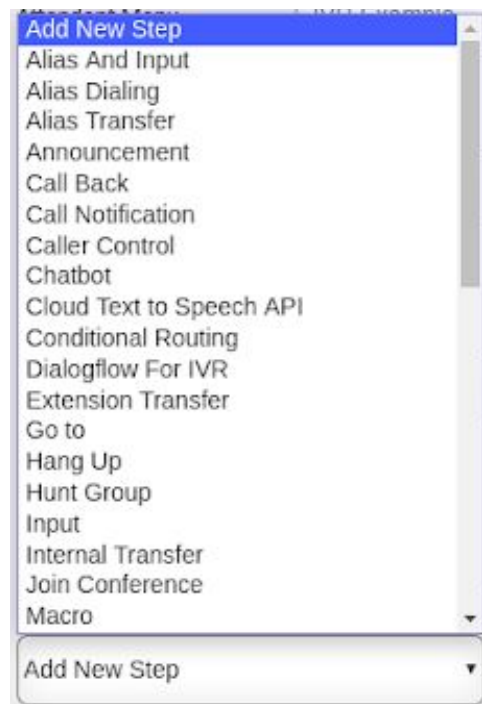
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

17. Click the save button, .

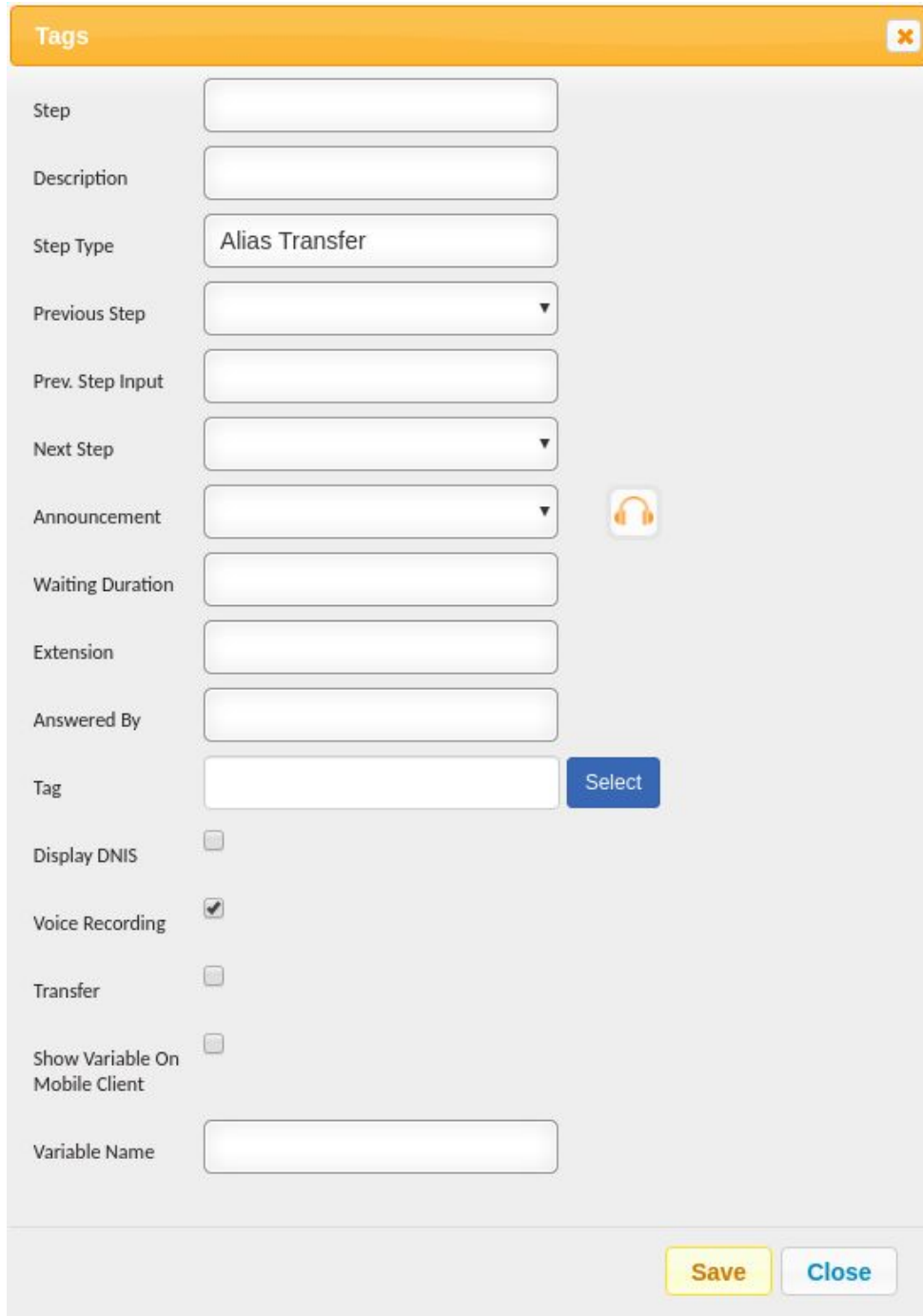
Adding Alias Transfer Step

The step used to transfer the call to the designated IP phone.

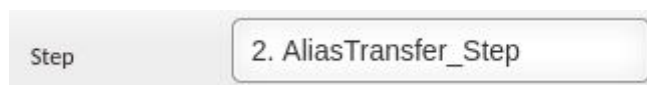
1. Click the “Add New Step” dropdown box, , the following list will appear:



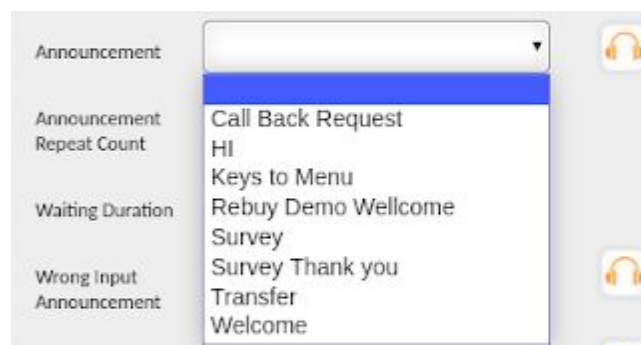
- Select the “Alias Transfer” step the following pop-up window will appear:




- Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

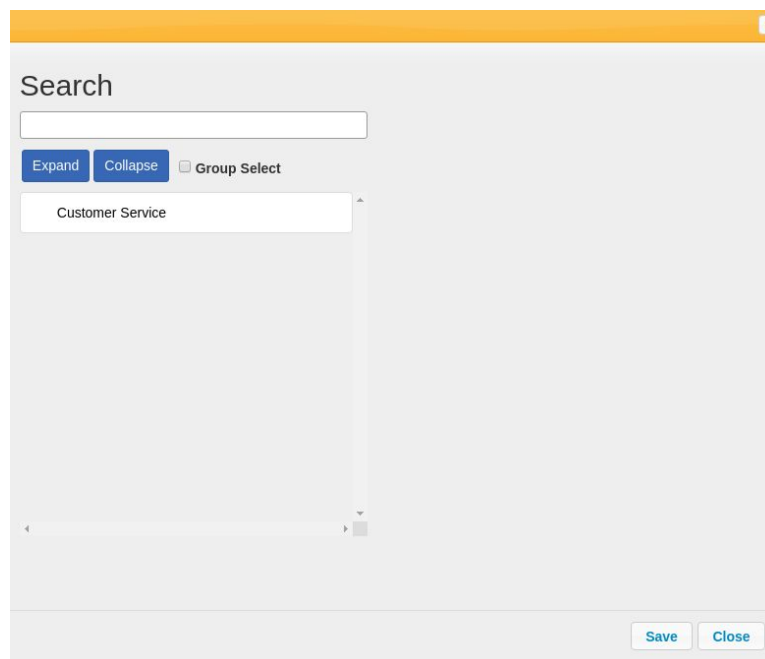
9. In the “Waiting Duration” input type the waiting duration for the customer input (Seconds) an example is shown below:

A screenshot of a form field labeled "Waiting Duration" with a text input box containing the number "10".

10. In the “Extension” input box type, the desired user’s extension.

11. In the “Answered By,” input box type the desired user’s name.

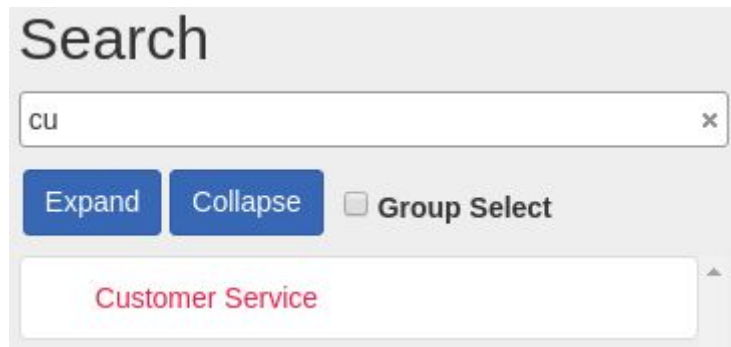
12. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

A screenshot of a "Search" pop-up window. It features a search input field at the top. Below it are two buttons, "Expand" and "Collapse", and a checkbox labeled "Group Select". A list box below these controls shows "Customer Service" as a selected item. At the bottom right of the window are "Save" and "Close" buttons.

13. Search for a Tag using the “Search” input box shown below:

A screenshot of a "Search" input box with a text field below the label.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

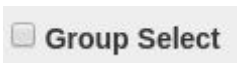


The image shows a search interface with the title "Search". Below the title is a search input field containing the text "cu". To the right of the input field is a small "x" icon. Below the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a list box containing the text "Customer Service" in red font.

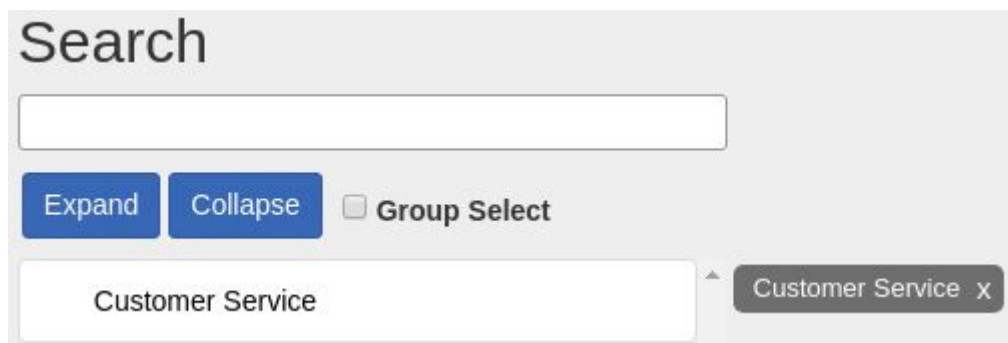
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

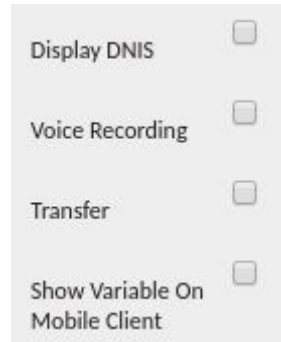
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The image shows the same search interface as before, but with the "Customer Service" tag selected. The "Customer Service" text is now in black font in the list box. To the right of the list box, there is a dark grey button with the text "Customer Service" and a small "x" icon.

Note: To delete a Tag from the selection simply click the "X," , to the right of the tag name

14. Below the tag's input box, the following four checkboxes are displayed:



Display DNIS ☐

Voice Recording ☐


Transfer ☐

Show Variable On Mobile Client ☐

The descriptions of these checkboxes are explained below:


Display DNIS	When clicked shows the agent's number, not customers. It is used to mask the customer's number.
Voice Recording	If checked, it allows the customer's voice to be recorded.
Transfer	Used by the Call Center Studio Development Team (Do not check)
Show Variable on Mobile Client	If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.

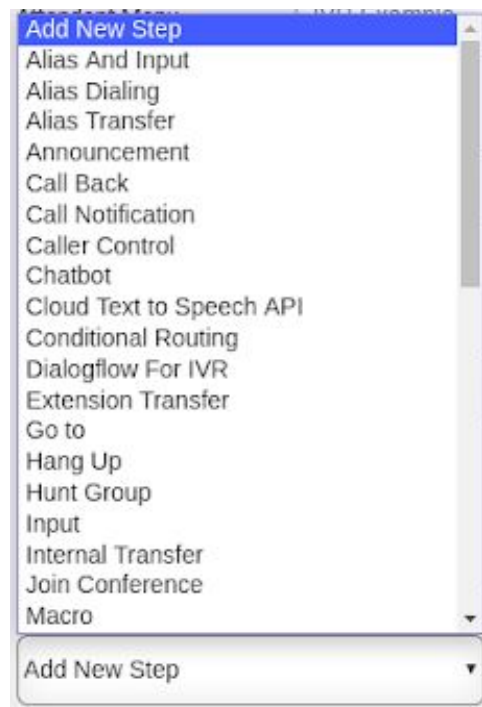
15. If the Show Variable on Mobile Client checkbox is selected, click the “Variable Name” input box and type the desired variable name. If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.

16. Click the save button,  .

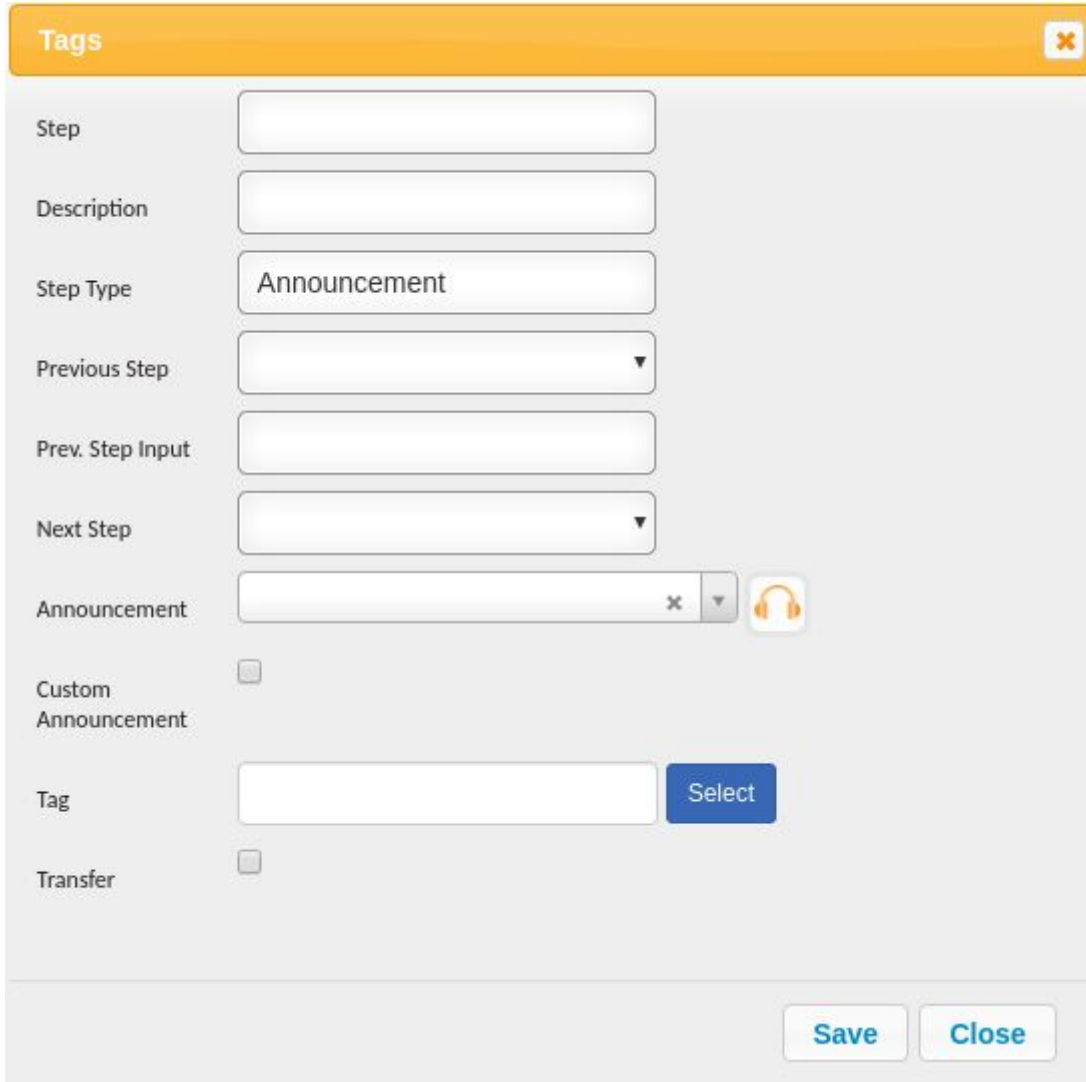
Adding Announcement Step

The specified entrance announcement (Welcome to XX Company) can be added using this IVR step.


1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Announcement” step the following pop-up window will appear:

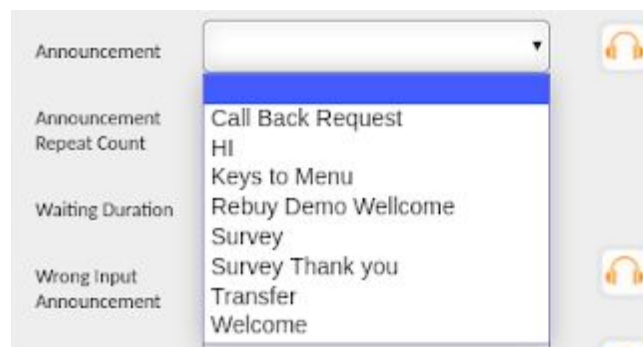



3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button,  , located to the right of each Announcement dropdown list.


9. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox (Used in combination with the Text-To-Speech step, contact the Call Center Studio Development team if a Text-to-Speech IVR is desired.)

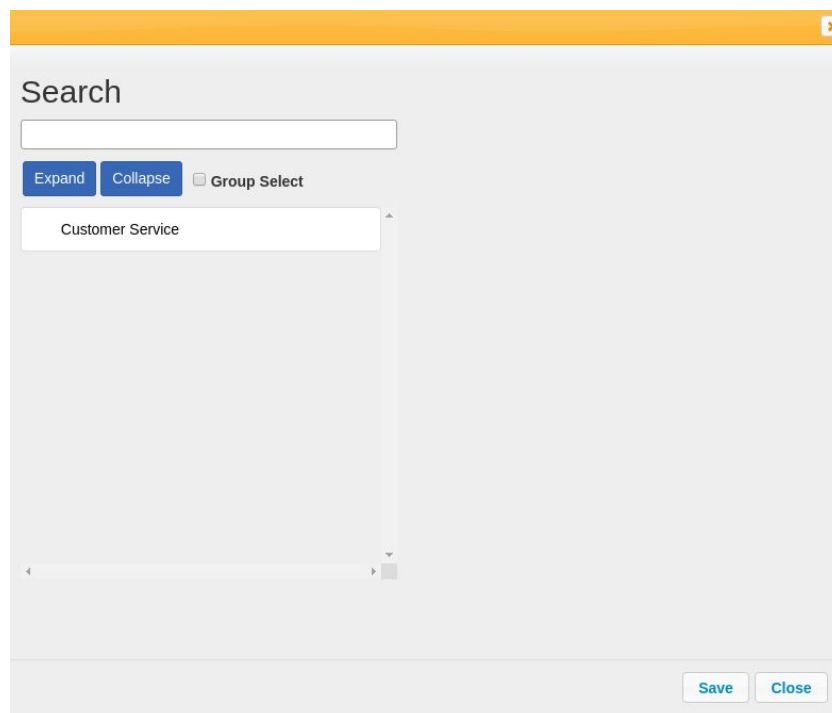
The following input box will appear:



A screenshot of a user interface element. It features a light gray rectangular box. On the left side of the box, the text "Custom Announcement" is displayed. To the right of this text is a small square checkbox containing a checkmark. Below the text and checkbox is a white rectangular input field with a thin gray border and a vertical cursor line inside.

10. In the input box, type the custom announcement name.

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

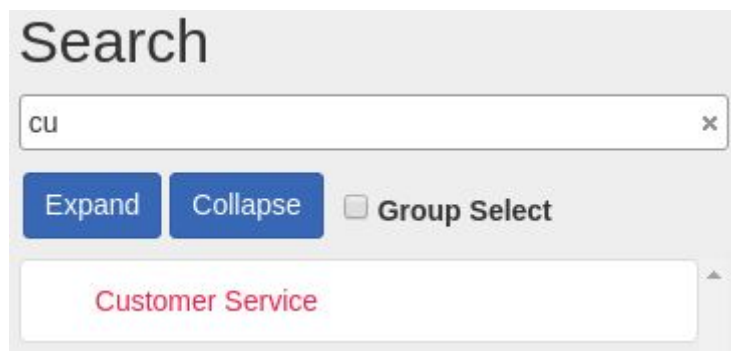


A screenshot of a pop-up window titled "Search". The window has a light gray background and a thin orange border at the top. At the top left, the word "Search" is displayed. Below it is a white rectangular input field. Under the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a white rectangular list box containing the text "Customer Service". At the bottom right of the window are two small buttons labeled "Save" and "Close".

12. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A small vertical line is visible at the start of the input box, indicating the cursor position.

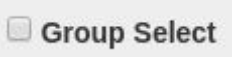
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of a search results interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box containing the text "cu" and a small "x" icon on the right. Below the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a white rectangular box containing the text "Customer Service" in red font. A small upward-pointing arrow is visible on the right side of this box.

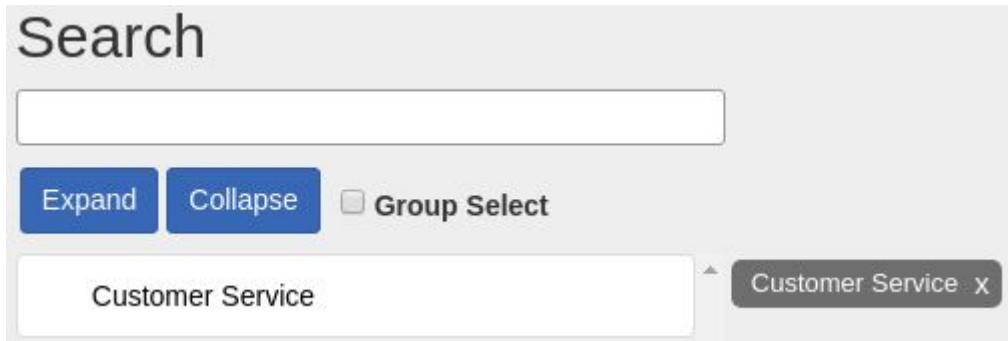
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

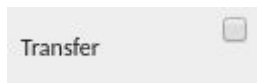
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a 'Search' section with a text input field. Below the input field are two buttons: 'Expand' and 'Collapse', followed by a checkbox labeled 'Group Select'. Below these is a list box containing the text 'Customer Service'. To the right of the list box, the selected tag 'Customer Service' is displayed with a small 'x' icon to its right, indicating it can be removed.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.


13. Below the tag’s input box, the following checkbox is displayed:



A checkbox labeled 'Transfer' with an unchecked box to its right.


The description of the checkbox is explained below:

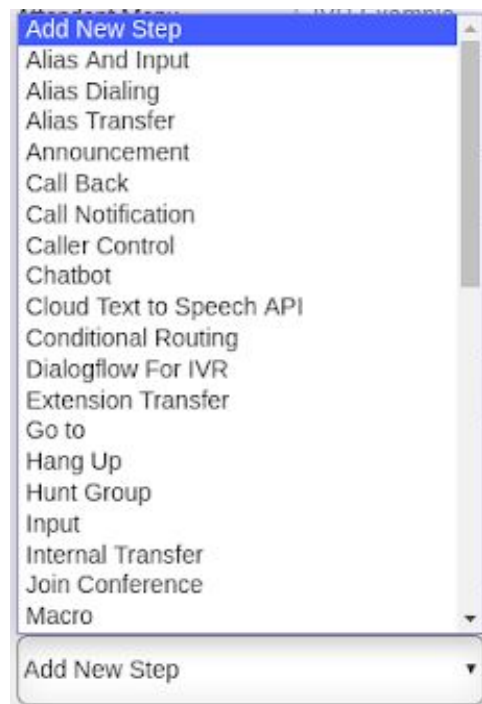
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

14. Click the save button, .

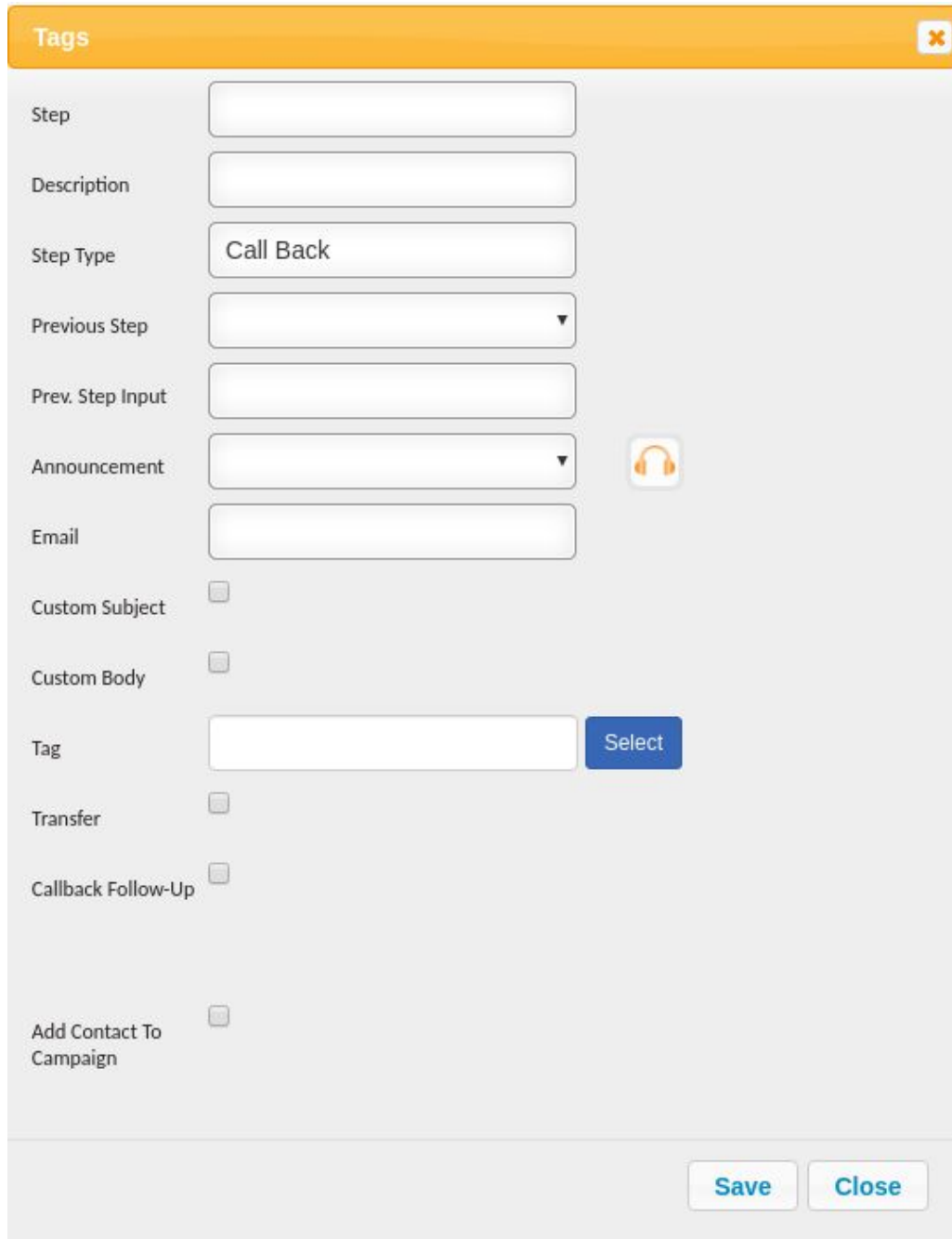
Adding Call Back Step

The step used to make a notification of missed calls by email.


1. Click the “Add New Step” dropdown box, , the following list will appear:



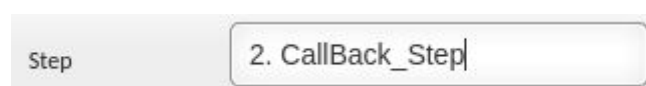
2. Select the “Call Back” step the following pop-up window will appear:



The image shows a pop-up window titled "Tags" with a close button (X) in the top right corner. The window contains several input fields and checkboxes. The "Step Type" field is set to "Call Back". The "Announcement" field has a headset icon next to it. The "Tag" field has a "Select" button next to it. The "Save" and "Close" buttons are at the bottom right.

Step	<input type="text"/>
Description	<input type="text"/>
Step Type	Call Back
Previous Step	<input type="text"/>
Prev. Step Input	<input type="text"/>
Announcement	<input type="text"/> 
Email	<input type="text"/>
Custom Subject	<input type="checkbox"/>
Custom Body	<input type="checkbox"/>
Tag	<input type="text"/> <input type="button" value="Select"/>
Transfer	<input type="checkbox"/>
Callback Follow-Up	<input type="checkbox"/>
Add Contact To Campaign	<input type="checkbox"/>

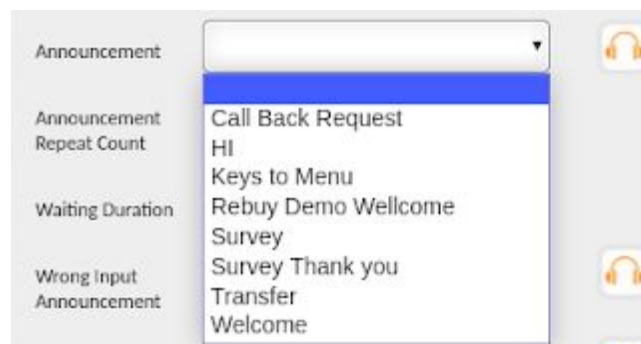
3. Click the “Step” input box, type the desired step name. An example is shown below:




The image shows a single input box with the label "Step" and the text "2. CallBack_Step" entered.

Step	2. CallBack_Step
------	------------------

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

8. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)

9. If desired, the “Custom Subject” checkbox can be checked. If checked, a custom email subject line can be created using the input box that appears:




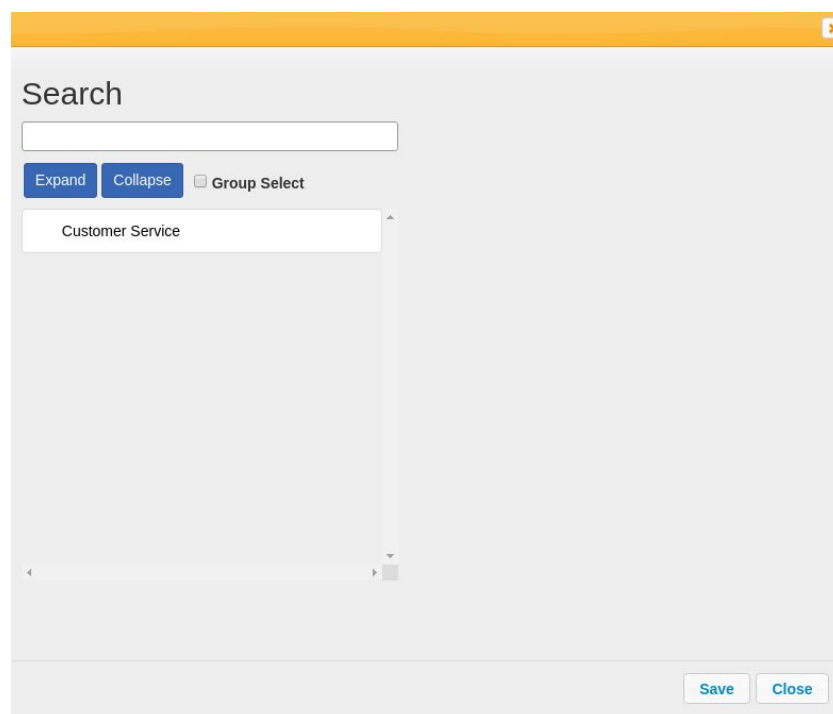
A screenshot of a form section. At the top, there is a checkbox labeled 'Custom Subject' which is checked. Below this, there is a text input box labeled 'Subject'.

10. If desired, the “Custom Body” checkbox can be checked. If checked a custom email body can be created using the input box that appears:



A screenshot of a form section. At the top, there is a checkbox labeled 'Custom Body' which is checked. Below this, there is a text input box labeled 'Body'.

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

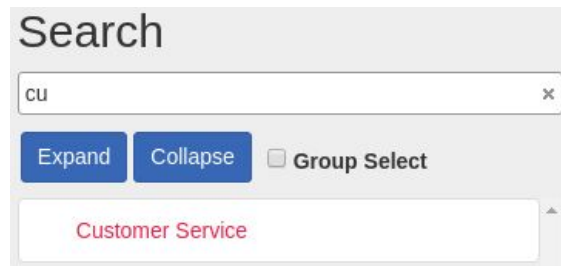


A screenshot of a pop-up window titled 'Search'. It features a search input field at the top. Below the input field are two buttons: 'Expand' and 'Collapse', followed by a checkbox labeled 'Group Select'. A list of search results is displayed below, with 'Customer Service' visible. At the bottom right of the window are 'Save' and 'Close' buttons.

12. Search for a Tag using the “Search” input box shown below:

A search input box with the label "Search" in a bold, dark font. Below the label is a text input field with a vertical cursor on the left.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A search interface showing the results of a search for "CU". The input box contains "CU" and a clear button (X). Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list box containing the text "Customer Service" in red font.

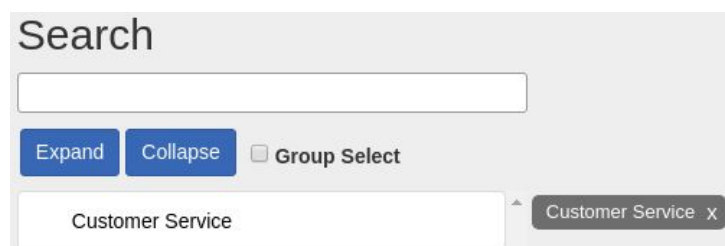
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

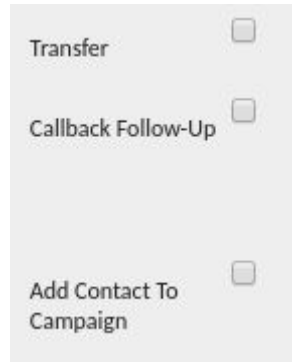
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

A search interface showing the results of a search for "Customer Service". The input box is empty. Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". Below these is a list box containing the text "Customer Service". To the right of the list box is a button labeled "Customer Service X".

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Below the tag's input box, the following three checkboxes are displayed:





Transfer ☐


Callback Follow-Up ☐

Add Contact To Campaign ☐

The descriptions of these checkboxes are explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
Callback Follow-up	<p>When checked, the following will be displayed:</p>  <p>Click the “Callback Follow-up Control Time” type the desired time for the customer to be called back. Normally used in combination with the “Add Contact to Campaign” checkbox.</p>

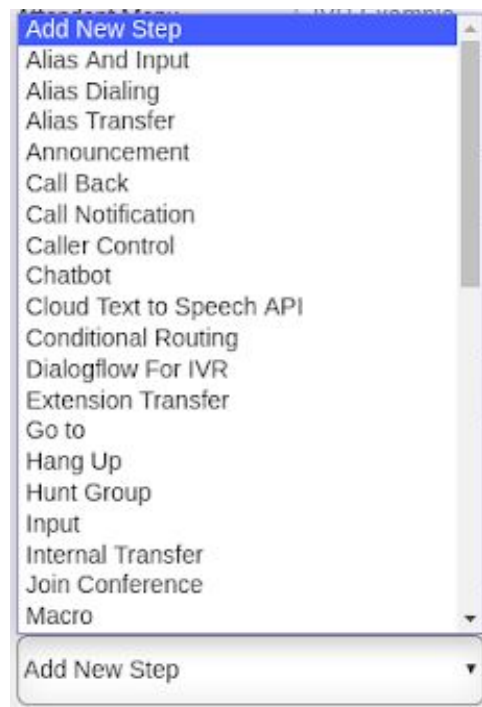
<p>Add Contact to Campaign</p>	<p>When checked, the following will be displayed:</p> <div data-bbox="802 472 1385 792">  </div> <p>Click the “Target Campaign” dropdown menu to select the desired campaign.</p> <p>Click the “Target List Name” type the desired list name.</p> <p>Click the “Add after X minutes” type the desired time after calling to add the caller to the Target Campaign.</p>
--------------------------------	--

14. Click the save button,  .

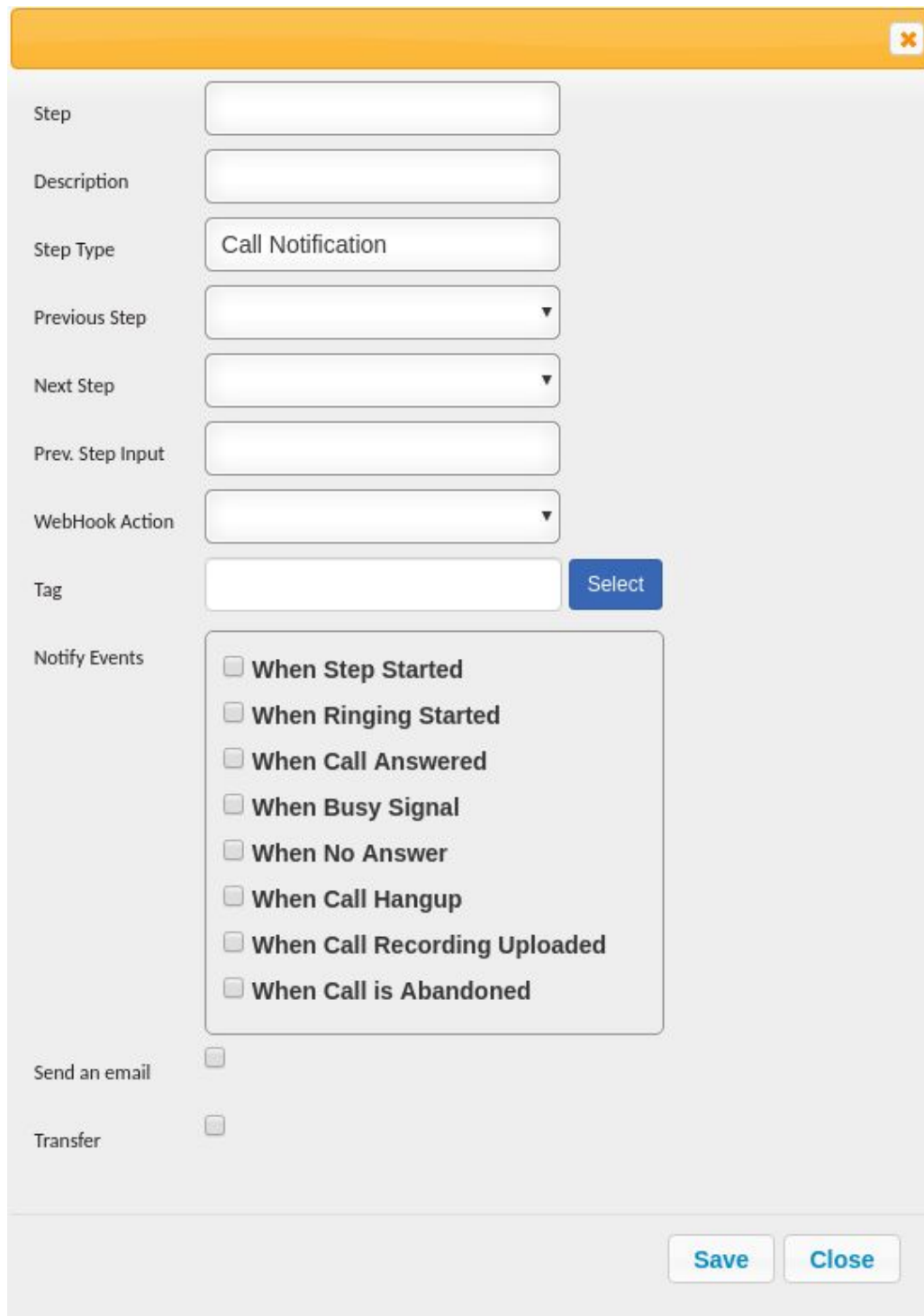
Adding Call Notification Step

The step where the web service, prepared by the customer and defined by Webhook, is triggered based on the call status, according to the notification events selected for users using IP telephony.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Call Notification” step the following pop-up window will appear:



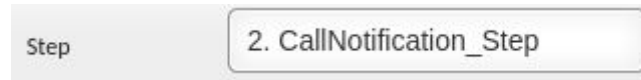
A pop-up window with an orange header bar containing a close button (X). The window is titled "Call Notification" and contains the following fields and options:

- Step:
- Description:
- Step Type:
- Previous Step:
- Next Step:
- Prev. Step Input:
- WebHook Action:
- Tag:
- Notify Events:

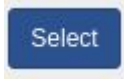
☐ When Step Started
☐ When Ringing Started
☐ When Call Answered
☐ When Busy Signal
☐ When No Answer
☐ When Call Hangup
☐ When Call Recording Uploaded
☐ When Call is Abandoned
- Send an email: ☐
- Transfer: ☐

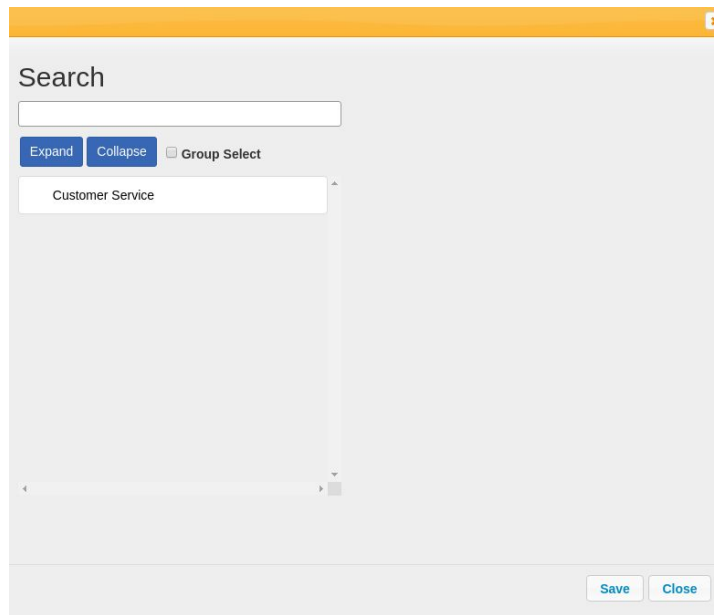
At the bottom right, there are two buttons: and .

-
3. Click the “Step” input box, type the desired step name. An example is shown below:

A screenshot of a software interface showing a label "Step" on the left and a text input box on the right. The input box contains the text "2. CallNotification_Step".

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
7. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
8. Click the “WebHook Action” input box, a dropdown menu will appear with created webhooks, select the desired webhook (See the Web URLs section for more information on creating webhooks).

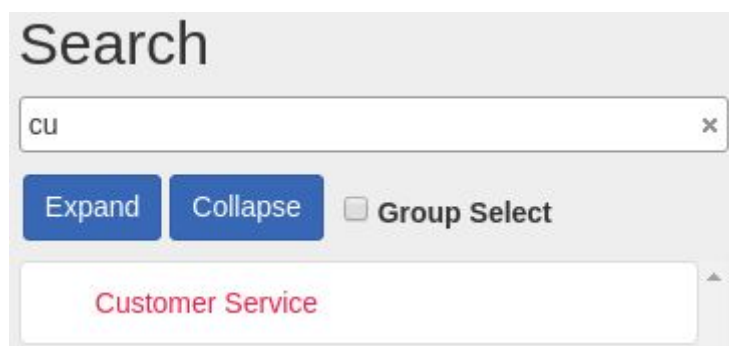
9. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



10. Search for a Tag using the “Search” input box shown below:



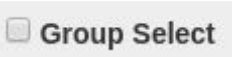
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



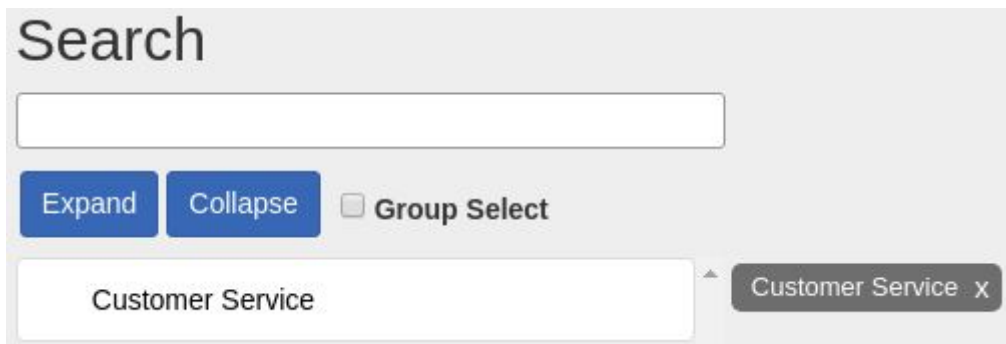
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

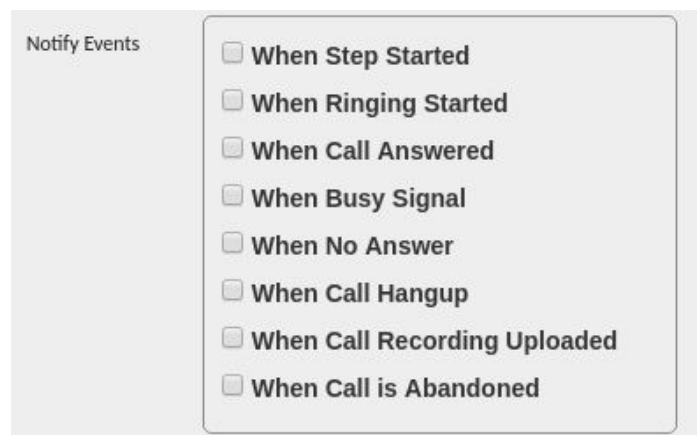
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

The screenshot shows a 'Search' interface. At the top is a search input field. Below it are three buttons: 'Expand' (blue), 'Collapse' (blue), and 'Group Select' (checkbox). Below these buttons is a list box containing the tag 'Customer Service'. To the right of the list box, the tag 'Customer Service' is displayed with a small 'x' icon next to it, indicating it has been selected.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name

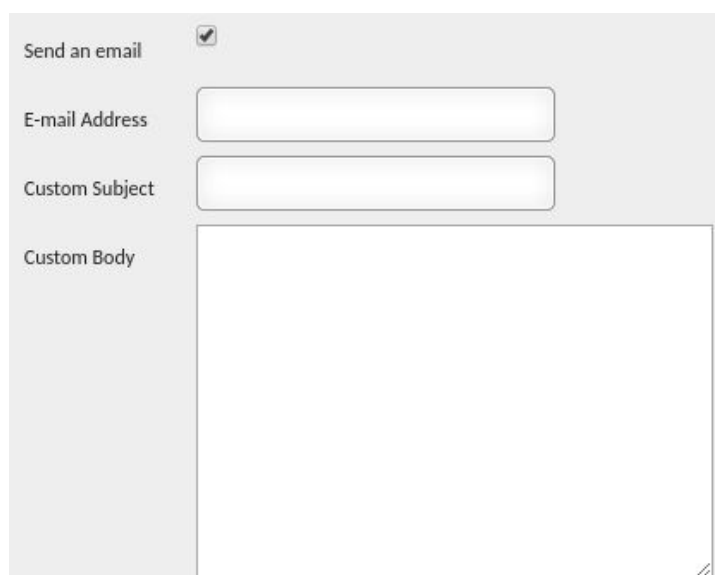
11. Call Notification events can be sent to a user via email notification or web service via the created Webhook in the Web URLs section. The following notification events can be selected, the user then would receive notifications regarding the checked events via email or a web service (For more information or set up questions contact the assigned Call Center Studio Project Manager).



Notify Events

- ☐ When Step Started
- ☐ When Ringing Started
- ☐ When Call Answered
- ☐ When Busy Signal
- ☐ When No Answer
- ☐ When Call Hangup
- ☐ When Call Recording Uploaded
- ☐ When Call is Abandoned

12. If desired notifications can be sent via email instead of a web service by checking the “Send an email” checkbox, once selected the following input boxes will be displayed:



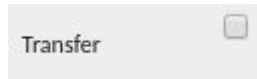
Send an email ☒

E-mail Address

Custom Subject


Custom Body

-
13. In the “Email Address,” input box type the desired email addresses.
 14. In the “Custom Subject” input box, type a custom email subject line if desired.
 15. In the “Custom Body” input box, type a custom email body if desired.
 16. Below the “Send an email” input box, the following checkbox is displayed:




The description of the checkbox is explained below:

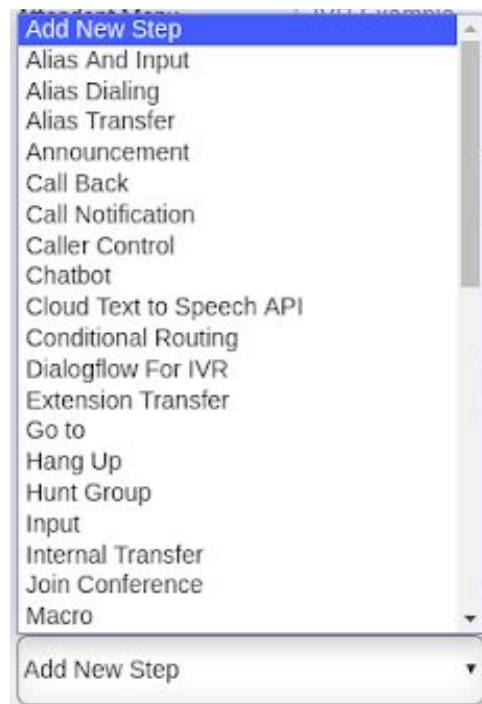
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

17. Click the save button, .

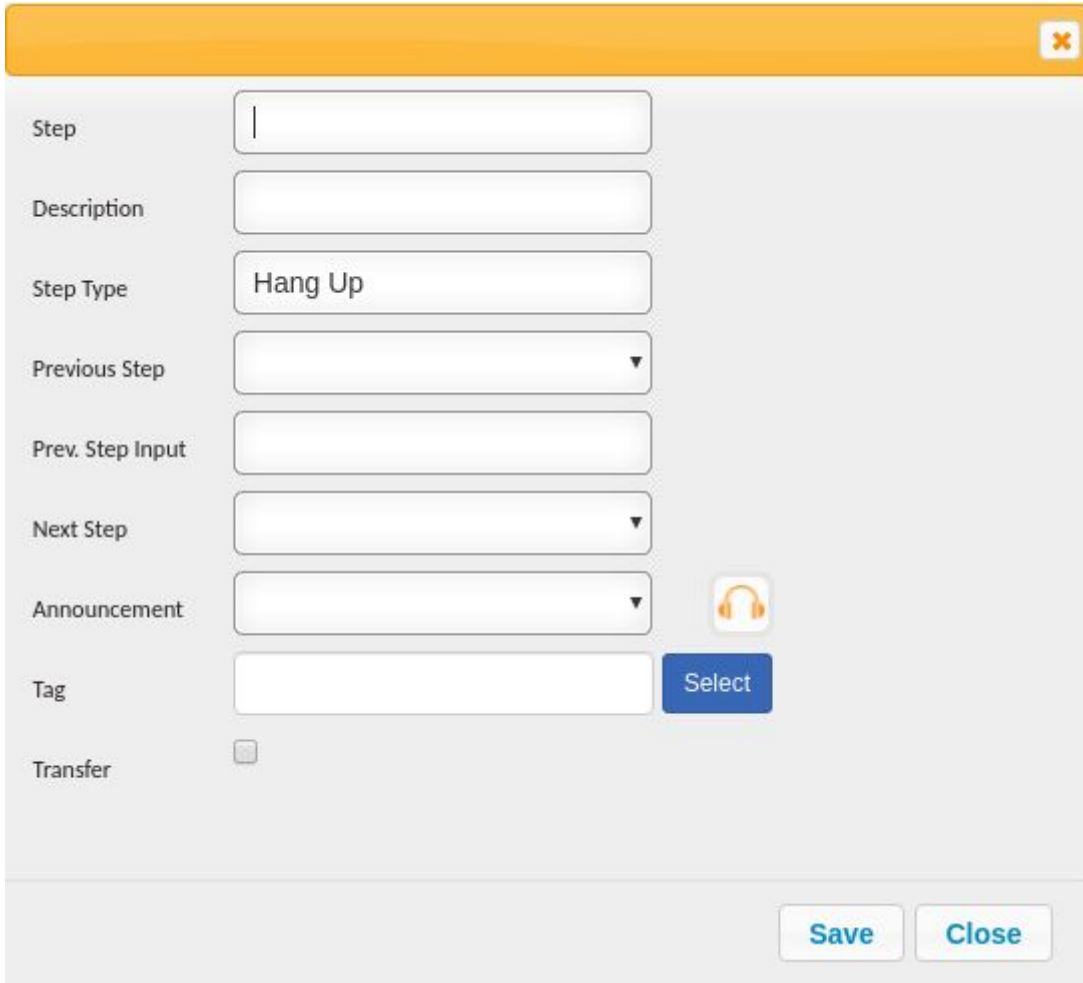
Adding Hang Up Step

The step is used to disconnect the call.

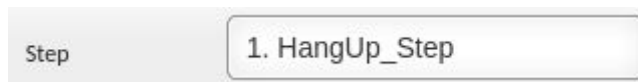
1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Hang up” step the following pop-up window will appear:

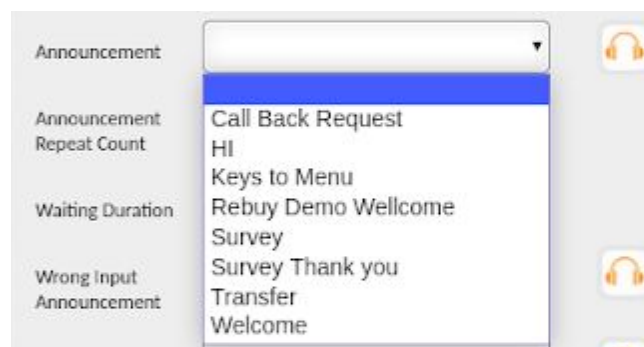



3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).

7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

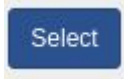


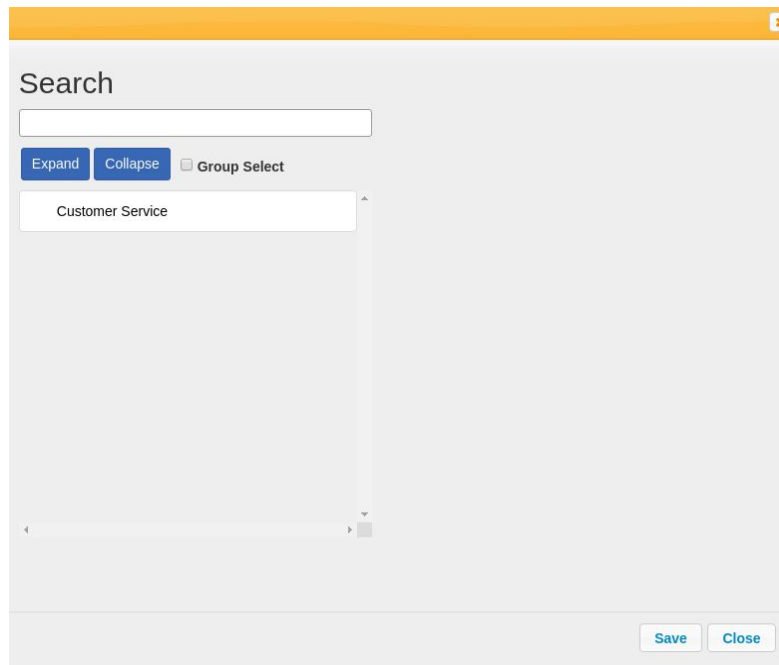
Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:



10. In the input box, type the custom announcement name.

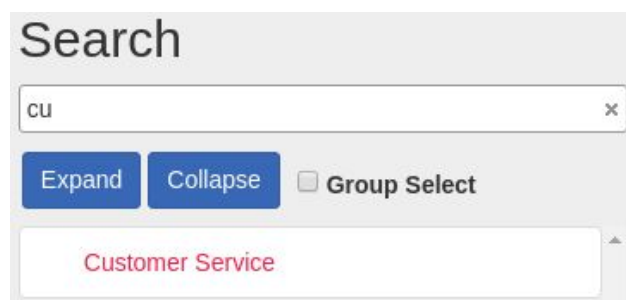
11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:




12. Search for a Tag using the “Search” input box shown below:



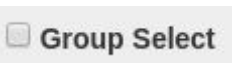
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



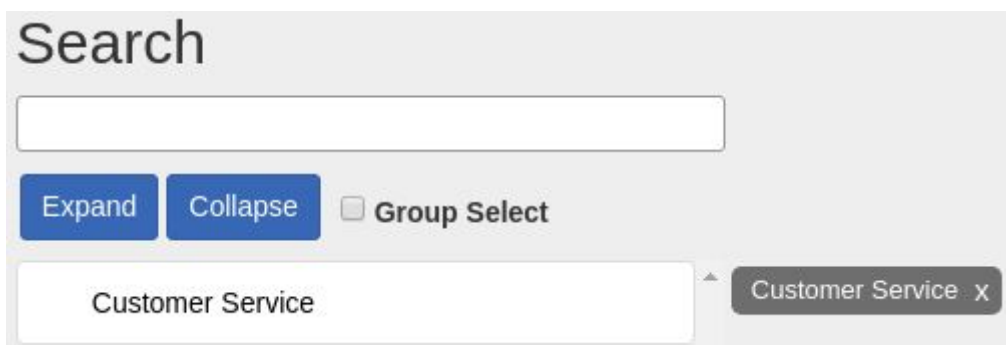
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

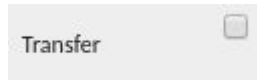
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a search interface with a title 'Search' and a search input field. Below the input field are three buttons: 'Expand', 'Collapse', and 'Group Select' (which is a checkbox). Below these buttons is a list box containing the tag 'Customer Service'. To the right of the list box, the tag 'Customer Service' is displayed with an 'X' icon next to it, indicating it is selected and can be removed.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Below the tag's input box, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.

The description of the checkbox is explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

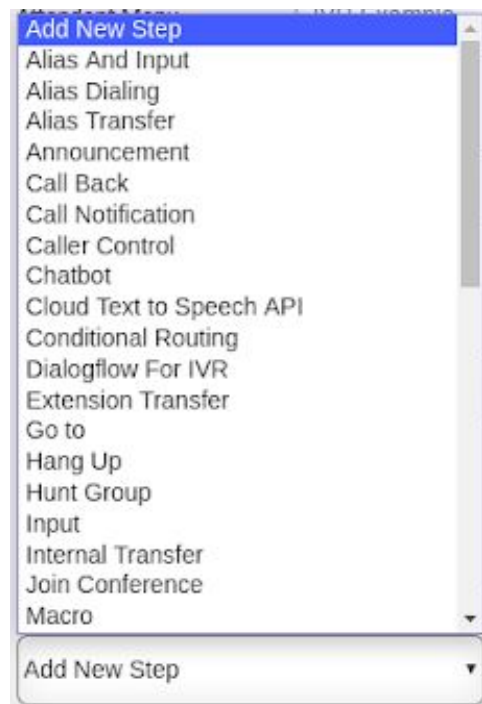
14. Click the save button,

A light gray rectangular button with the word "Save" in blue text.

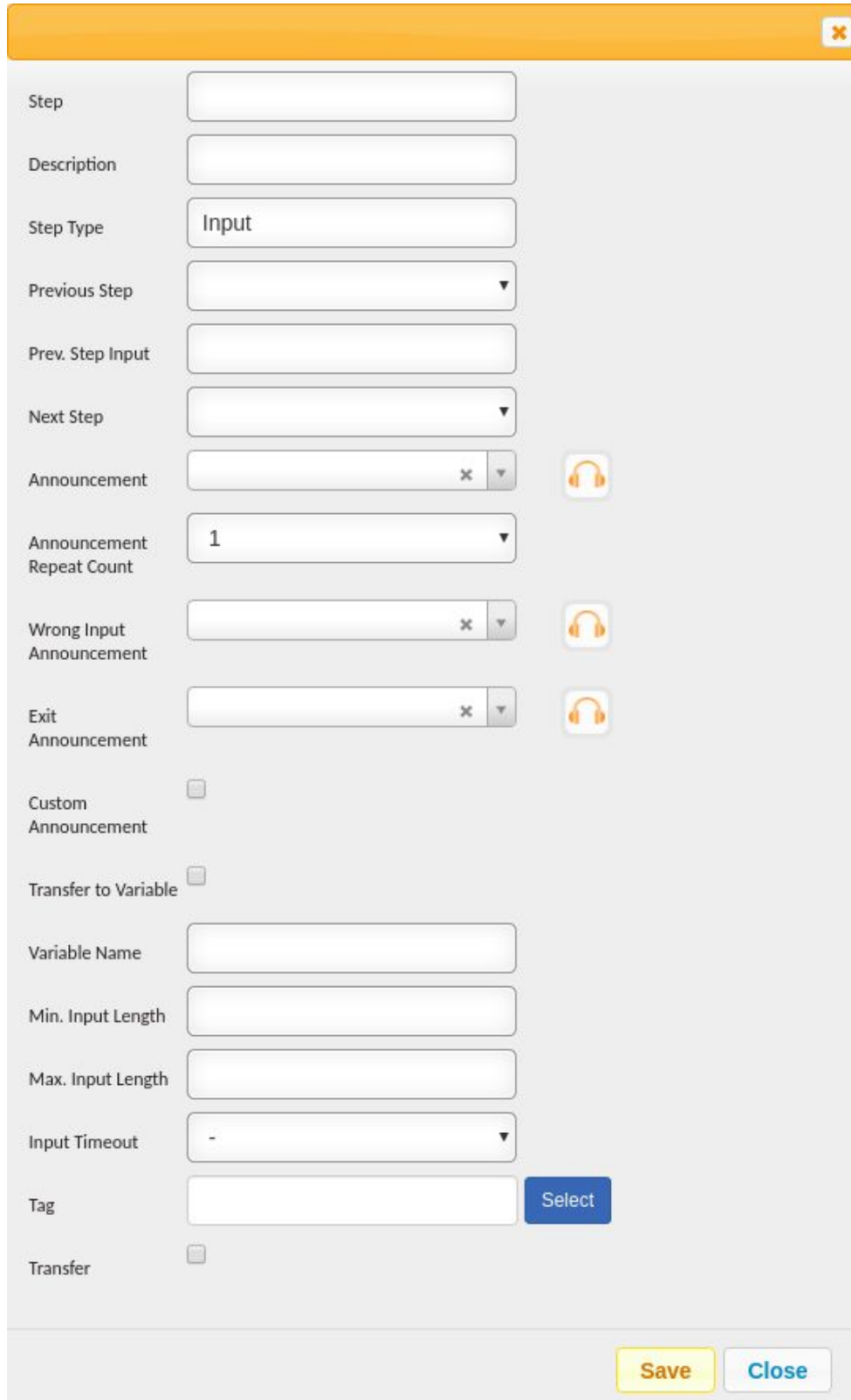
Adding Input Step




The step is used to create an input step for the caller based on an announcement.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Input” step the following pop-up window will appear:

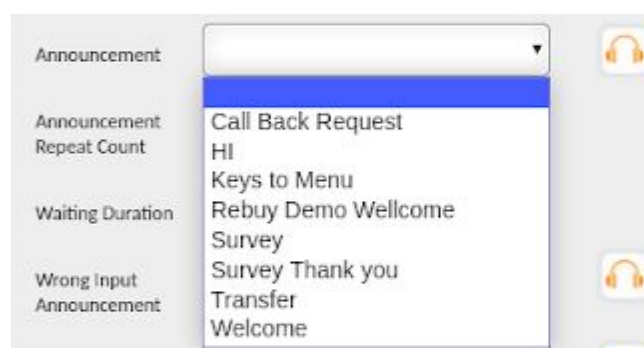



Step	<input type="text"/>
Description	<input type="text"/>
Step Type	Input
Previous Step	<input type="text"/>
Prev. Step Input	<input type="text"/>
Next Step	<input type="text"/>
Announcement	<input type="text"/> 
Announcement Repeat Count	1
Wrong Input Announcement	<input type="text"/> 
Exit Announcement	<input type="text"/> 
Custom Announcement	<input type="checkbox"/>
Transfer to Variable	<input type="checkbox"/>
Variable Name	<input type="text"/>
Min. Input Length	<input type="text"/>
Max. Input Length	<input type="text"/>
Input Timeout	-
Tag	<input type="text"/> <input type="button" value="Select"/>
Transfer	<input type="checkbox"/>

3. Click the “Step” input box, type the desired step name. An example is shown below:

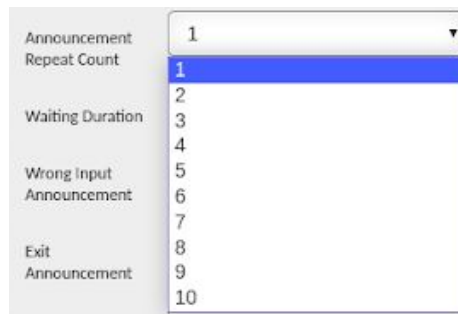


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a dropdown menu for the 'Announcement Repeat Count' input box. The menu is open, displaying a list of numbers from 1 to 10. The number '1' is currently selected and highlighted in blue. The input box itself is visible at the top of the dropdown, showing the value '1'.


10. Select the desired repeat count.
11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. Click the “Exit Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:

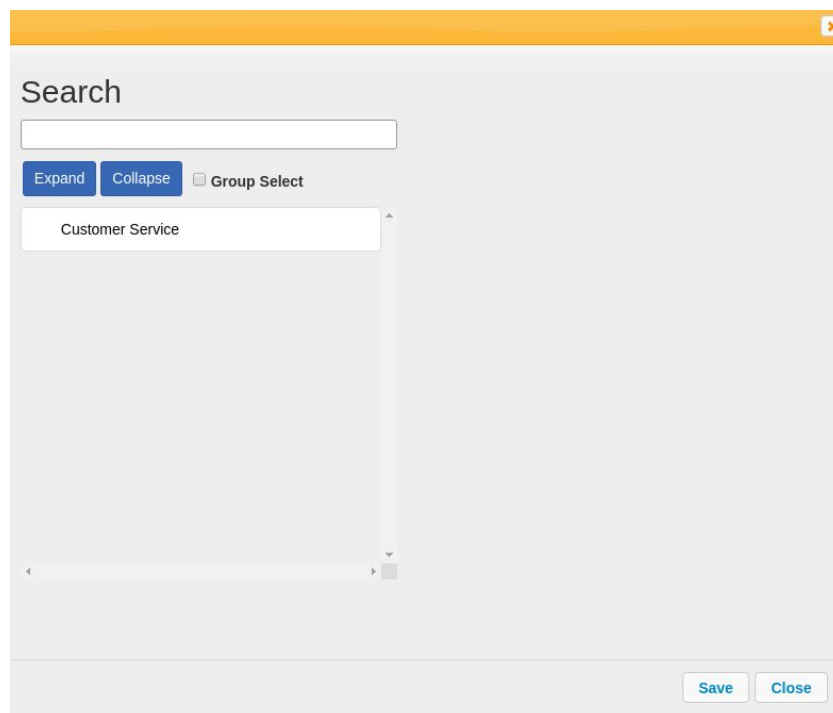


The screenshot shows a checkbox labeled 'Custom Announcement' which is checked. Below the checkbox is an empty input box for entering a custom announcement name.

14. In the input box, type the custom announcement name.
15. The agent can transfer to a variable by checking the “Transfer to Variable” checkbox.
16. If the “Transfer to Variable” checkbox is checked, click the “Variable Name” input box and type the desired variable name (user’s name).

17. Click the “Min. Input Length” input box type the minimum input length, always “1.”
18. Click the “Max. Input Length” input box type the maximum input length for the customer to select. For example, if the Alias’s range between 3 digits and 4 digits, the max input length will be 4.
19. In the “Input Timeout,” dropdown box type select the timeout duration for the customer input (Seconds).

20. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

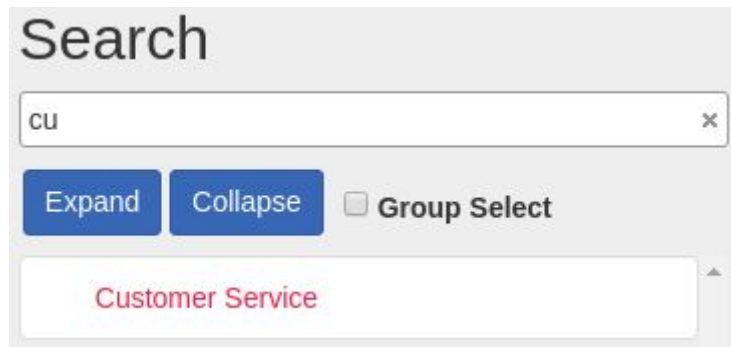


21. Search for a Tag using the “Search” input box shown below:



A search input box with the word "Search" in a large, bold font above it. The input box is empty and has a light gray border.

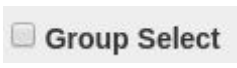
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



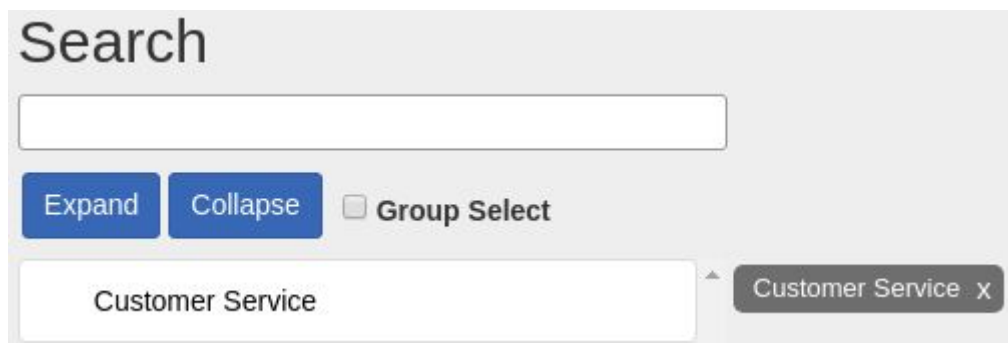
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

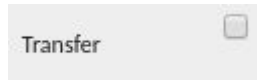
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

22. Below the tag's input box, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.

The description of the checkbox is explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

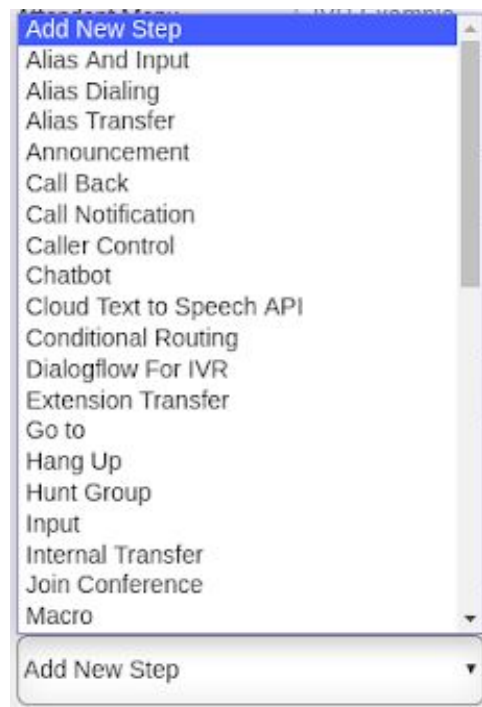
23. Click the save button,

A light gray rectangular button with the word "Save" in blue text.

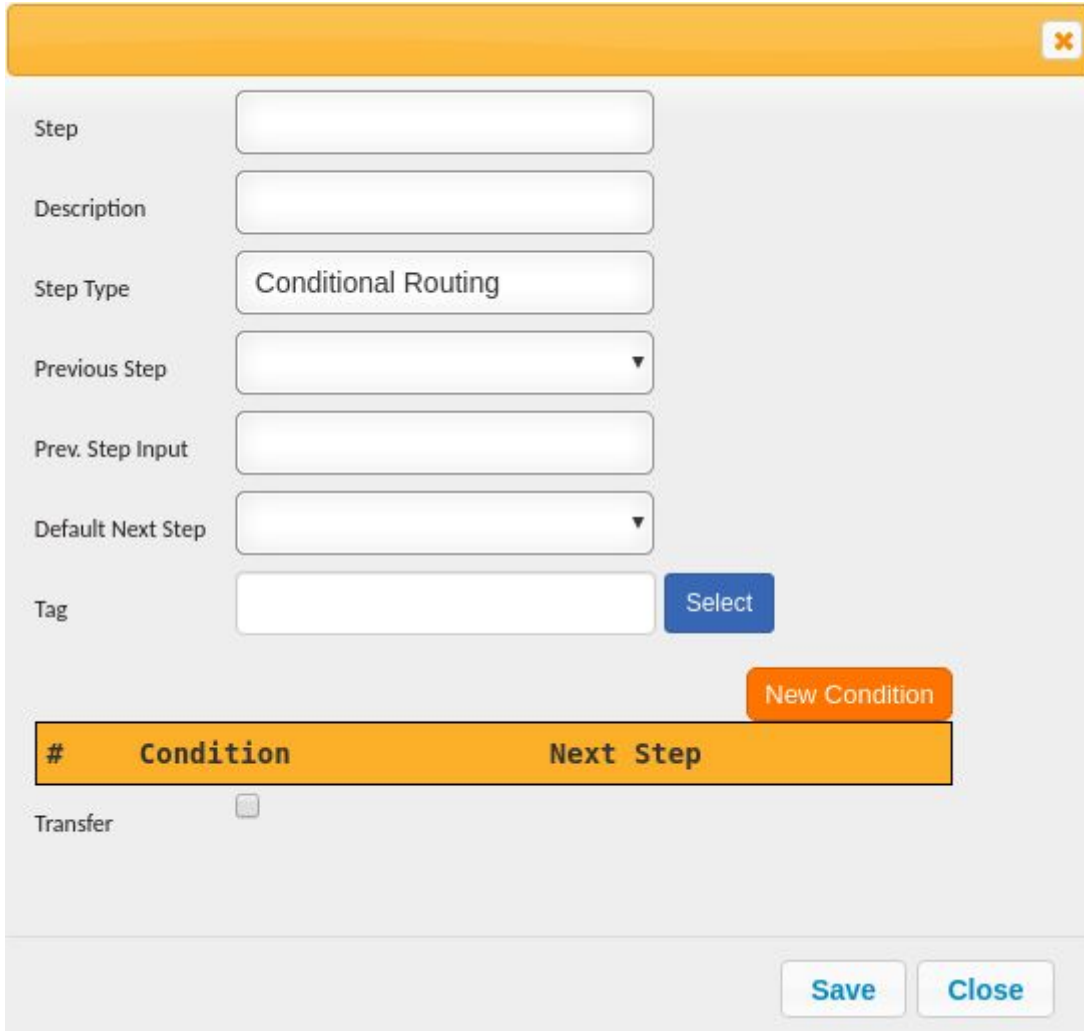
Adding Conditional Routing Step

Enables the call to be sent to a specific step of IVR according to the response returned from the variable or standard responses returned from the web service prepared by the user of the tenant (e.g., Cancellation, Preparing Order, In Cargo).

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Conditional Routing” step the following pop-up window will appear:




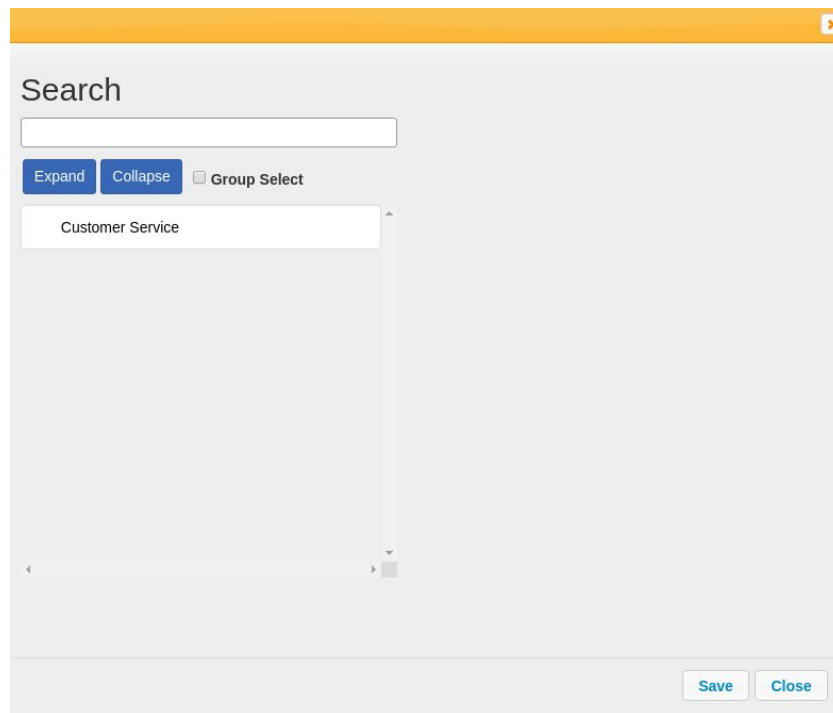
3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Default Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

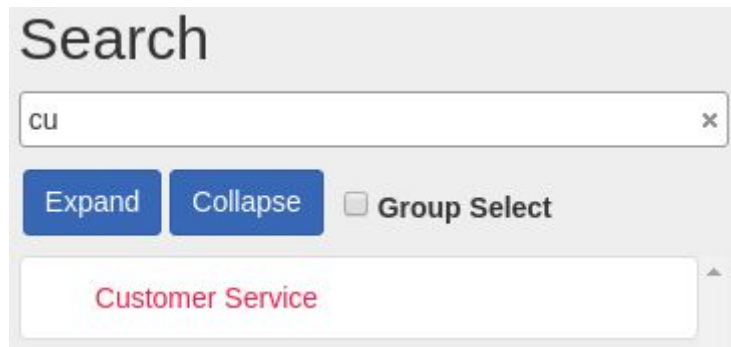
8. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



9. Search for a Tag using the “Search” input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

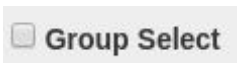


The image shows a search interface with a title "Search". Below the title is a search input field containing the text "cu". To the right of the input field is a small "x" icon. Below the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a list box containing the text "Customer Service" in red font.

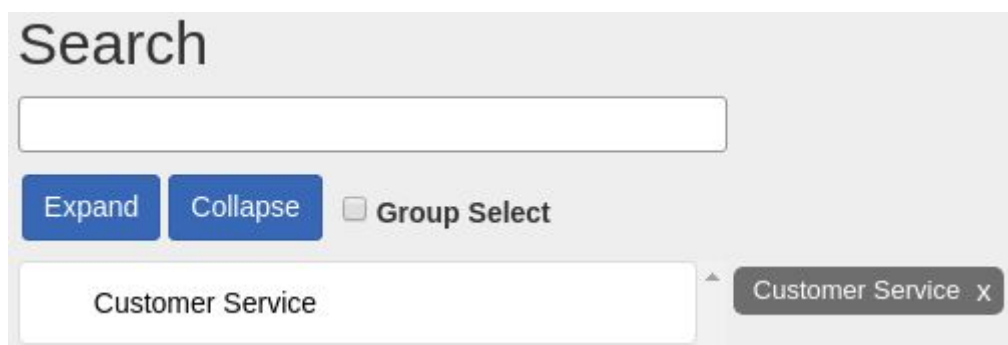
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags

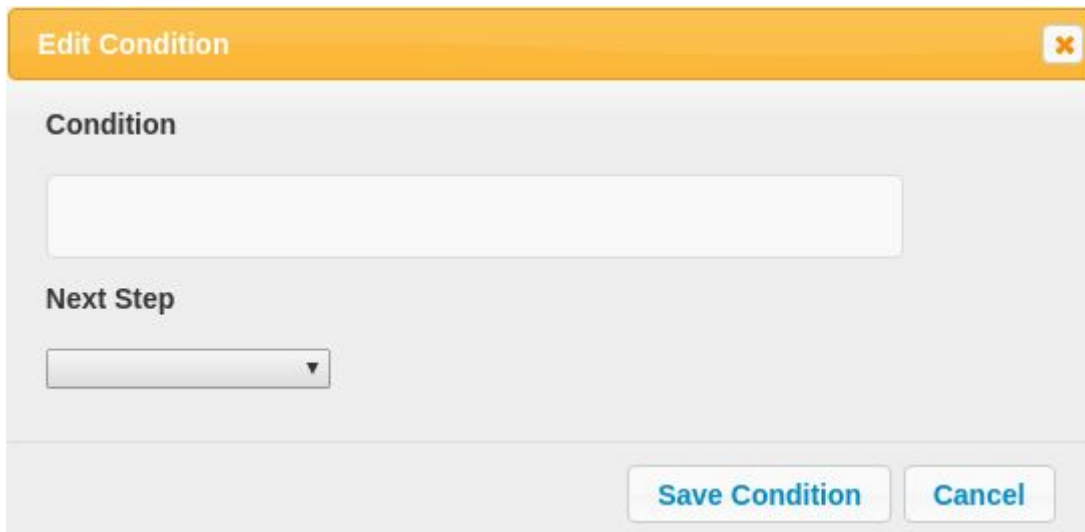
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The image shows the same search interface as before, but with the "Customer Service" tag selected. The "Customer Service" text is now in black font in the list box. To the right of the list box, there is a dark grey button with the text "Customer Service" and a small "x" icon.

Note: To delete a Tag from the selection simply click the "X," , to the right of the tag name.

10. To add a condition, press the new condition button, **New Condition**, the following pop-up screen will appear:

The image shows a dialog box titled "Edit Condition" with a close button (X) in the top right corner. The dialog has two main sections: "Condition" and "Next Step". The "Condition" section contains a large text input field. The "Next Step" section contains a dropdown menu. At the bottom right of the dialog are two buttons: "Save Condition" and "Cancel".

Edit Condition

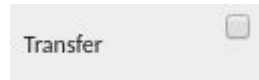
Condition

Next Step

Save Condition **Cancel**


11. In the “Condition” input box, type the condition (Defined value is written in web service).
12. Click the “Next Step” dropdown box, select the desired next step (The step that is desired to correspond to the value is selected). It is recommended to link all steps after setting up the IVR.
13. Click the save condition button, **Save Condition**.
14. Continue adding desired conditions.

15. Below the condition steps, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.


The description of the checkbox is explained below:

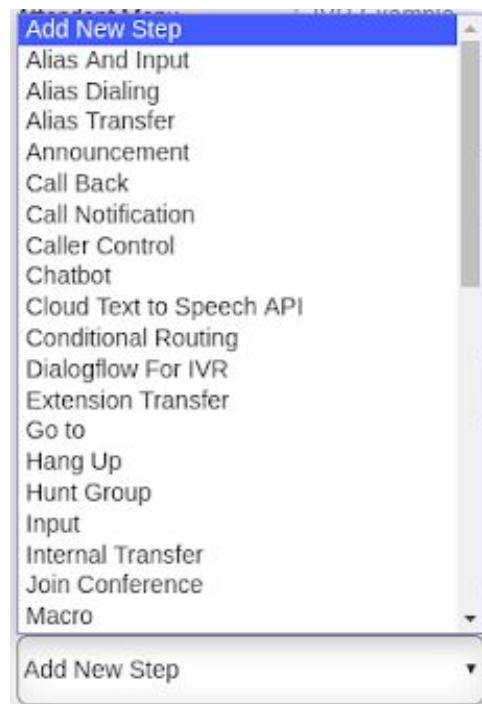
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

16. Click the save button, .

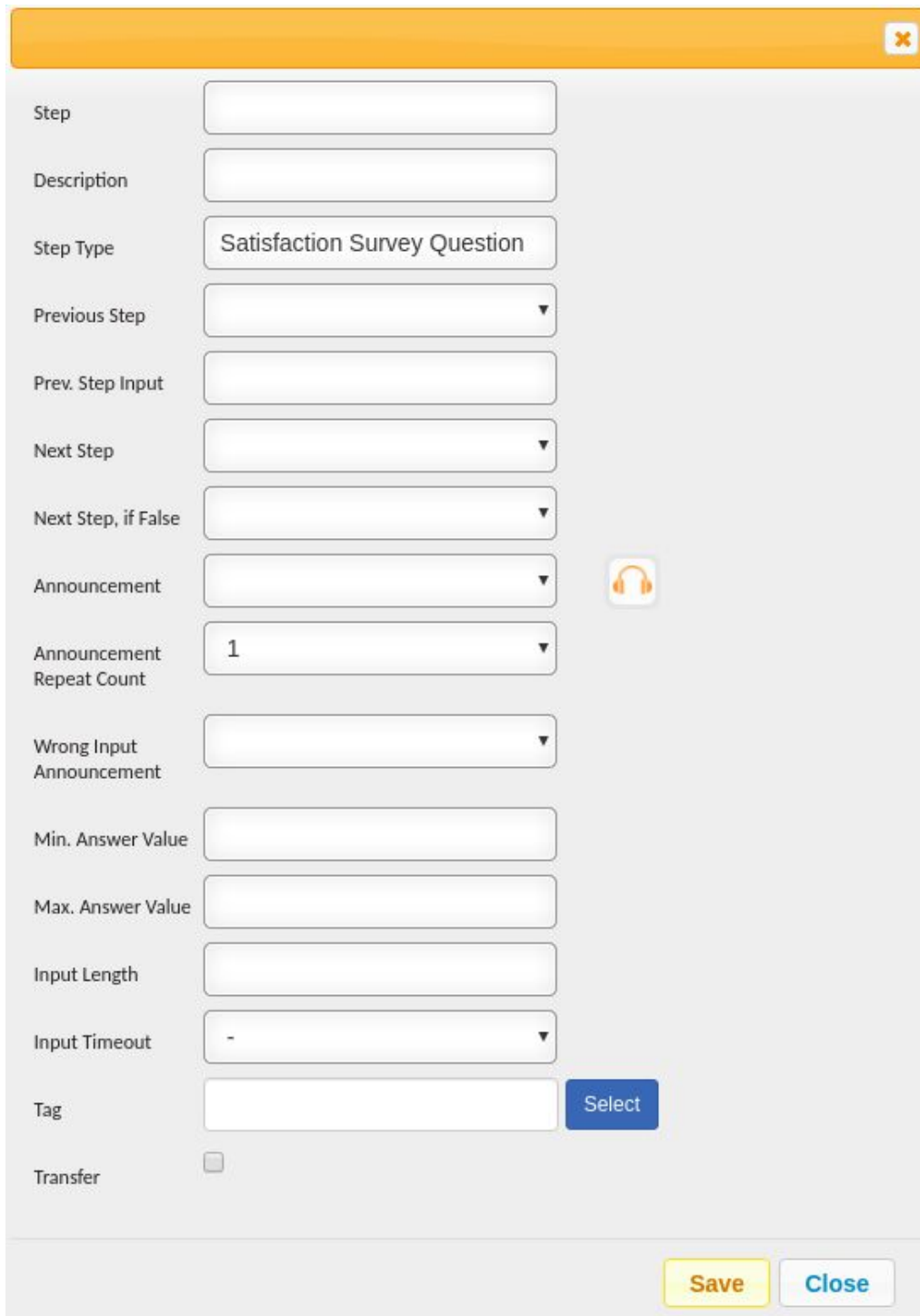
Adding Satisfaction Survey Question Step

The step is used to create a customer satisfaction survey question.

1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:

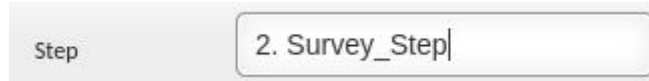


The screenshot shows a configuration window for a 'Satisfaction Survey Question' step. The window has a yellow header bar with a close button (X) in the top right corner. The main area contains a list of configuration fields on the left and a large empty space on the right. The fields are as follows:

- Step:** A text input field.
- Description:** A text input field.
- Step Type:** A dropdown menu with 'Satisfaction Survey Question' selected.
- Previous Step:** A dropdown menu.
- Prev. Step Input:** A text input field.
- Next Step:** A dropdown menu.
- Next Step, if False:** A dropdown menu.
- Announcement:** A dropdown menu. To its right is a small icon of a headset.
- Announcement Repeat Count:** A dropdown menu with '1' selected.
- Wrong Input Announcement:** A dropdown menu.
- Min. Answer Value:** A text input field.
- Max. Answer Value:** A text input field.
- Input Length:** A text input field.
- Input Timeout:** A dropdown menu with '-' selected.
- Tag:** A text input field next to a blue 'Select' button.
- Transfer:** A checkbox that is currently unchecked.

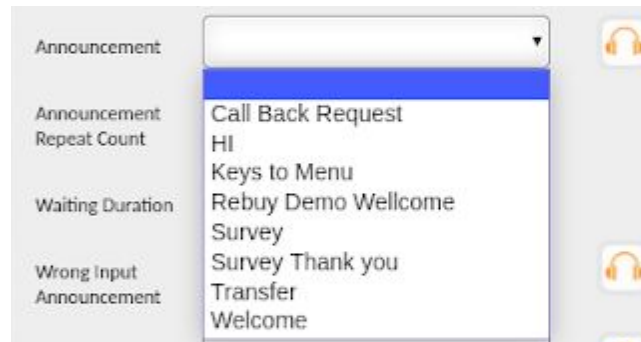
At the bottom right of the window are two buttons: a yellow 'Save' button and a white 'Close' button with a blue border.


-
3. Click the “Step” input box, type the desired step name. An example is shown below:

A screenshot of a software interface showing a label "Step" next to a text input field. The input field contains the text "2. Survey_Step|".

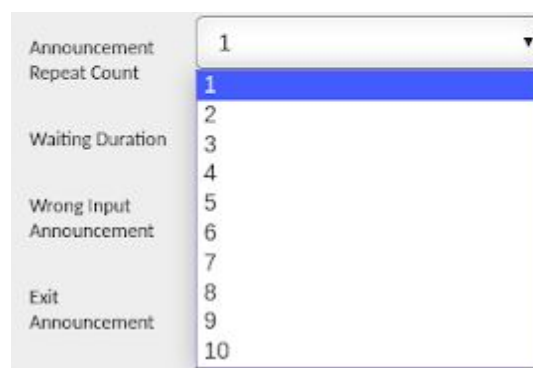
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

9. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:




Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

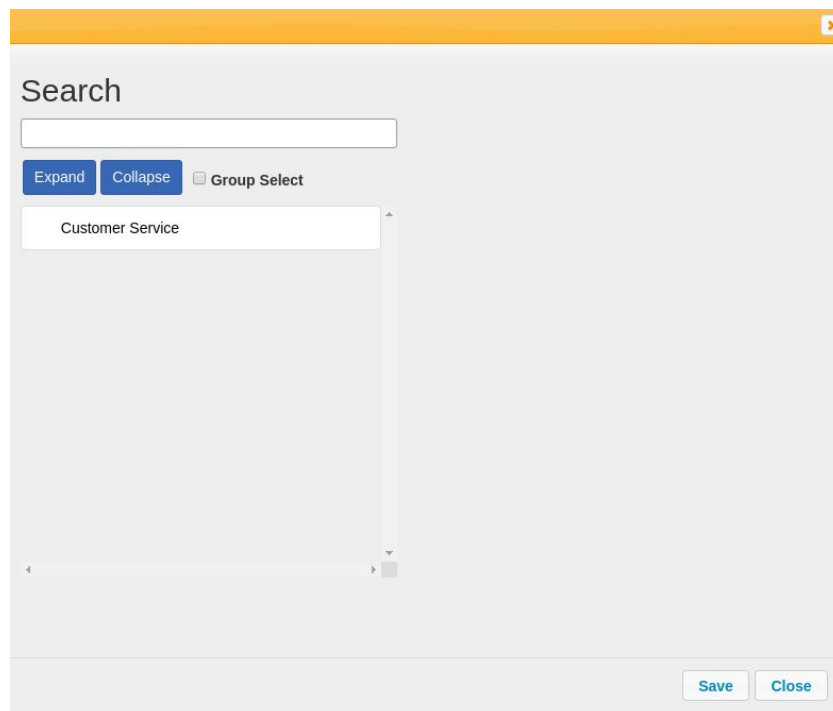
10. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



11. Select the desired repeat count.
12. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

13. Click the “Min. Answer Value” input box type the minimum answer value for the customer to select. For example, if the survey range is 1 to 5, the minimum answer value would be 1.
14. Click the “Max. Answer Value” input box type the maximum answer value for the customer to select. For example, if the survey range is 1 to 5, the maximum answer value would be 5.
15. Click the “Input Length” input box type the input length for the customer to select. For example, if the survey is one question, the input length would be 1.
16. In the “Input Timeout,” dropdown box type select the timeout duration for the customer input (Seconds).

17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

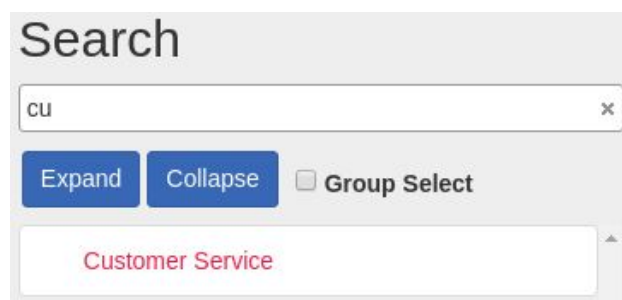


18. Search for a Tag using the “Search” input box shown below:



A search interface with the title "Search" in a large, bold, dark gray font. Below the title is a white rectangular input box with a thin gray border and a small vertical cursor on the left side.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



A search interface showing results. The title "Search" is at the top. Below it is a search input box containing the text "cu" with a small "x" icon to its right. Underneath the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a white box containing the text "Customer Service" in red font.

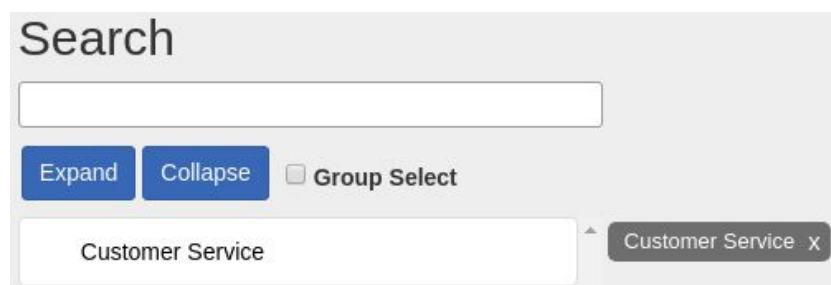
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

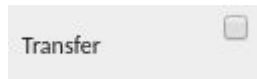
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



A search interface showing results. The title "Search" is at the top. Below it is a search input box. Underneath the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a white box containing the text "Customer Service" in red font. To the right of this box is a gray box containing the text "Customer Service" in white font, with a small "x" icon to its right.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Below the tag's input box, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.


The description of the checkbox is explained below:

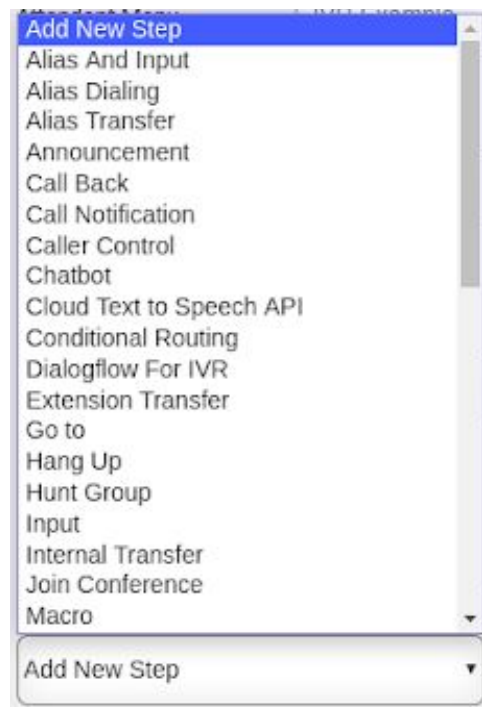
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

20. Click the save button, .

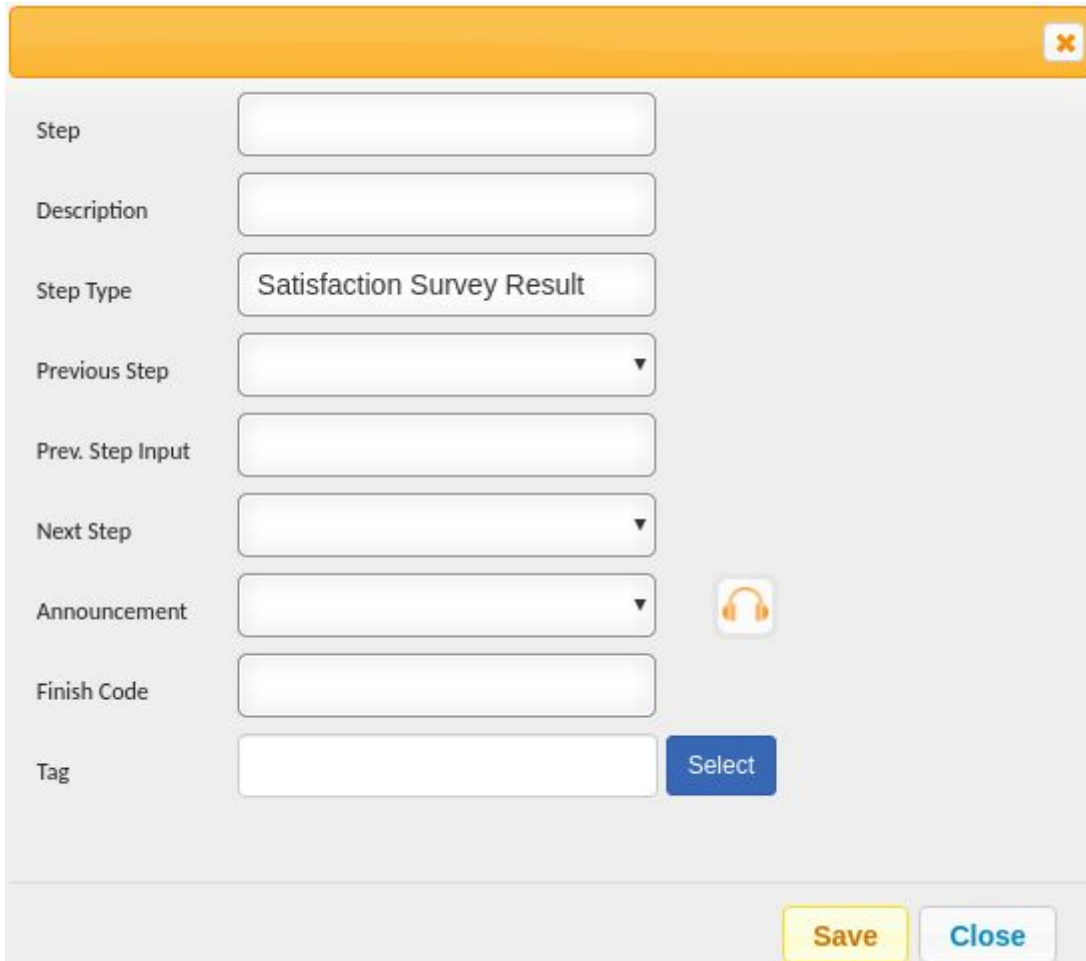
Adding Satisfaction Survey Result Step

The step used to create customer satisfaction input for the satisfaction survey. (Completes the survey, without using this on the Quality Control Screen the survey will be listed as incomplete).

1. Click the “Add New Step” dropdown box, , the following list will appear:

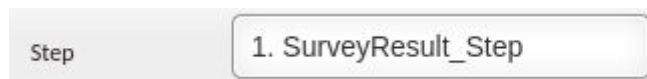


2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:



The screenshot shows a pop-up window with a yellow header bar containing a close button (X). The window contains several input fields and a dropdown menu. The fields are labeled: Step, Description, Step Type, Previous Step, Prev. Step Input, Next Step, Announcement, Finish Code, and Tag. The Step Type field is set to 'Satisfaction Survey Result'. The Previous Step and Next Step fields are dropdown menus. The Announcement field has a speaker icon next to it. The Tag field has a 'Select' button next to it. At the bottom right, there are 'Save' and 'Close' buttons.

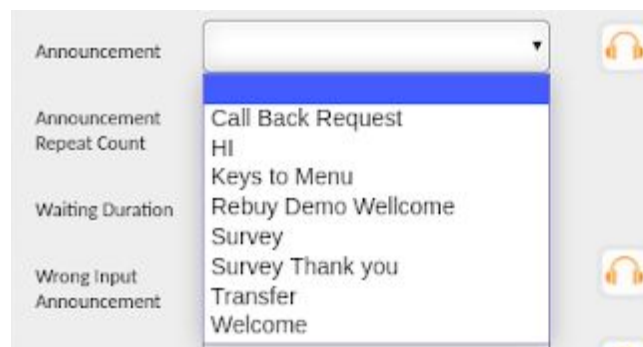
3. Click the “Step” input box, type the desired step name. An example is shown below:




The screenshot shows a single input box labeled 'Step' with the text '1. SurveyResult_Step' entered inside it.

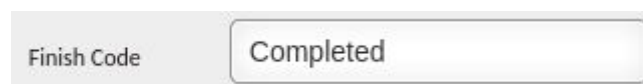
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

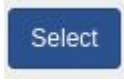
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

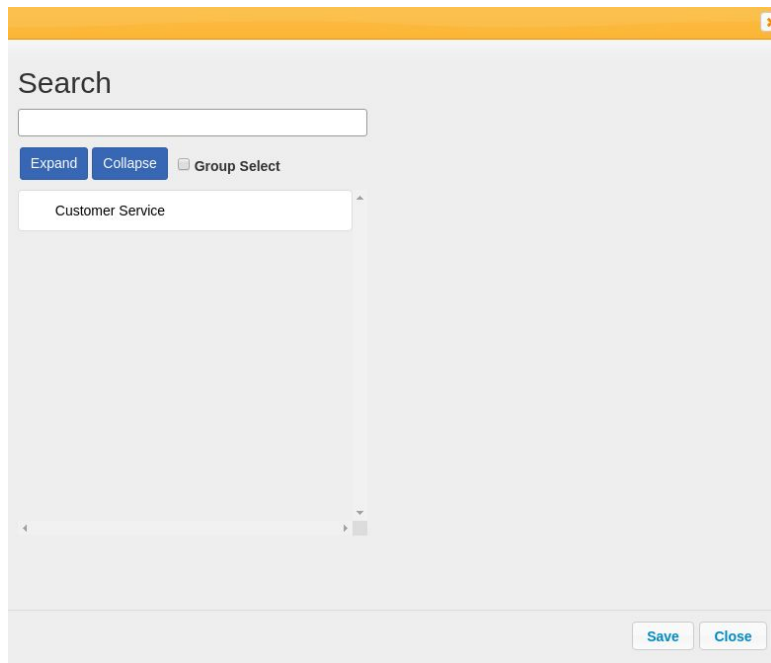


Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Finish Code” input box, type the desired finish code an example is shown below:



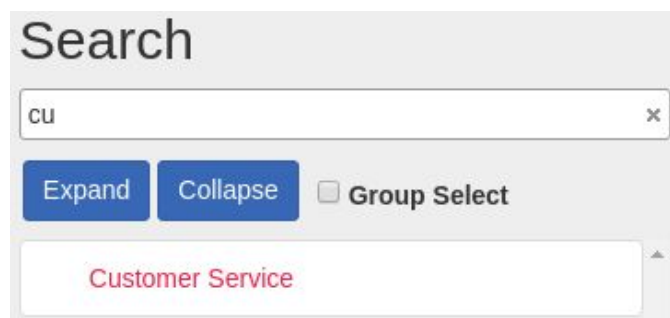
10. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



11. Search for a Tag using the “Search” input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



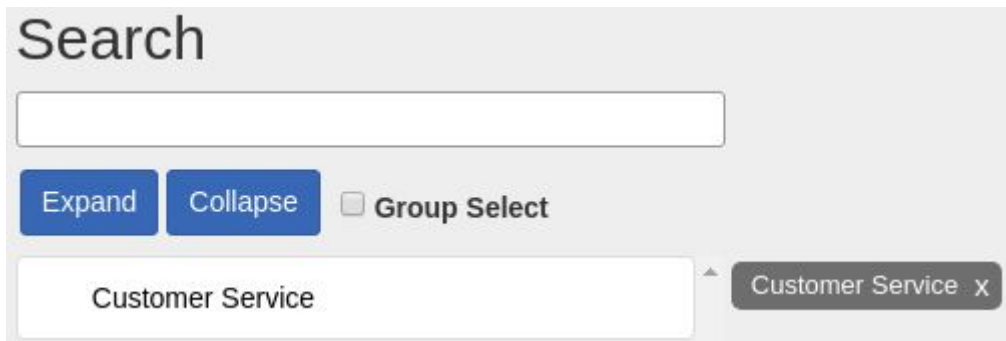
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.


Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a 'Search' interface. At the top is a search input field. Below it are three buttons: 'Expand', 'Collapse', and a checkbox labeled 'Group Select'. Below these buttons is a list box containing the text 'Customer Service'. To the right of the list box, the text 'Customer Service' is displayed with a small 'X' icon next to it, indicating it can be removed from the selection.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

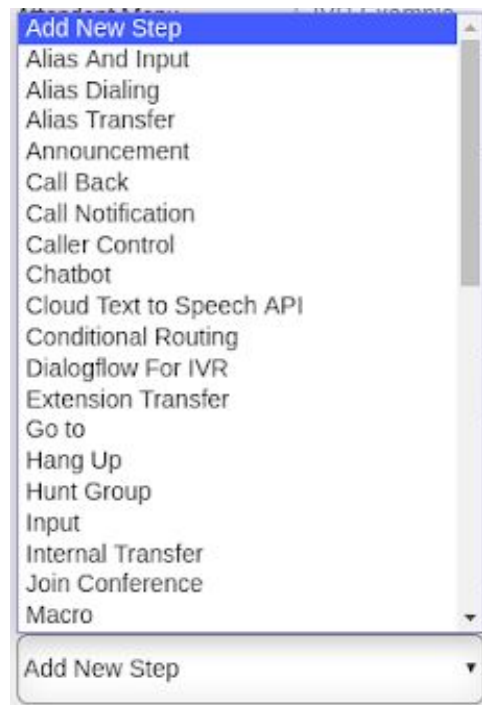
12. Below the tag's input box, the following checkbox is displayed:

13. Click the save button, .

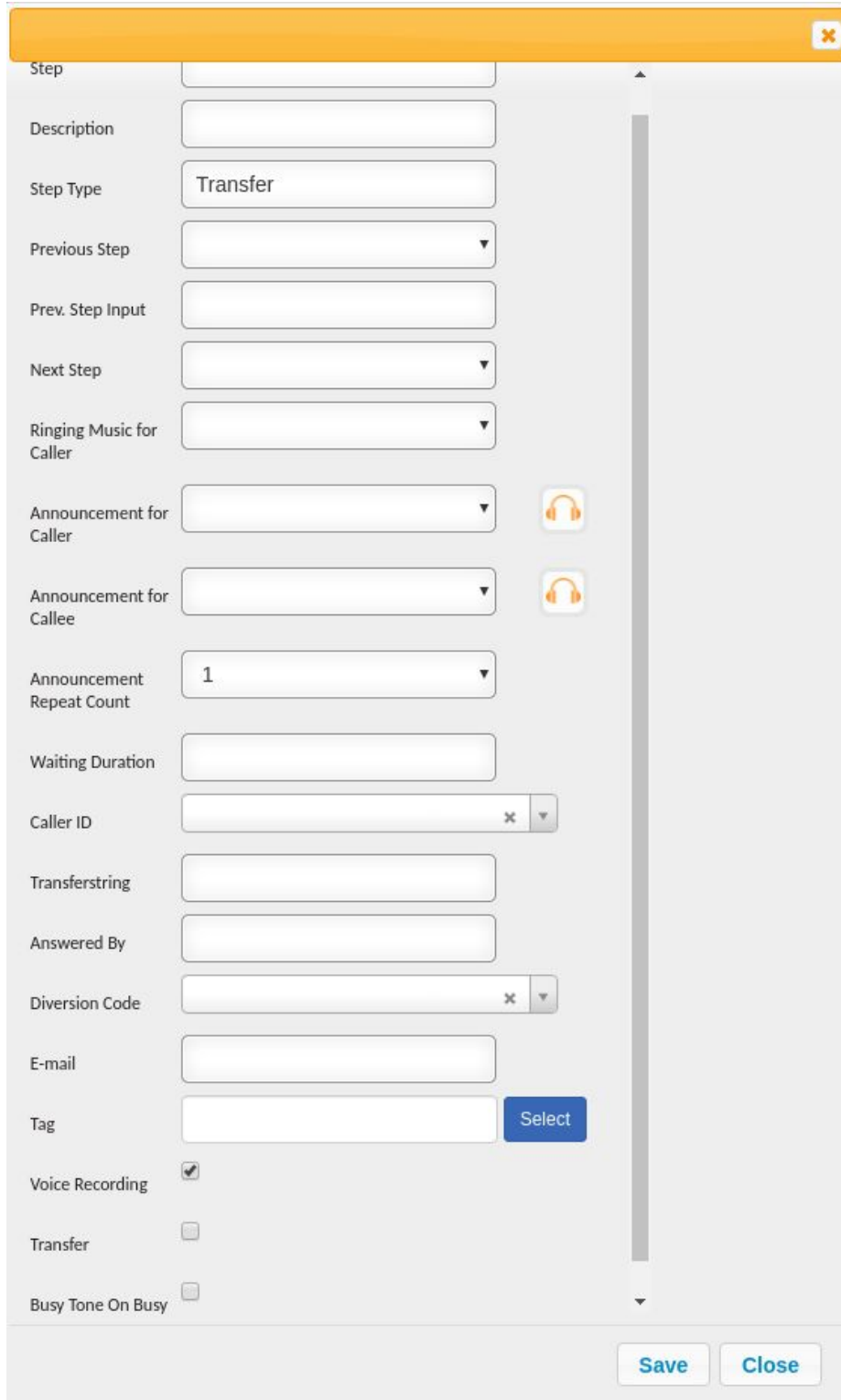
Adding Transfer Step

In cases where the system cannot be active due to internal/external factors or out of time, incoming calls are directed using this step to the desired number so that there are no missed calls.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Transfer” step the following pop-up window will appear:



Step

Description

Step Type: Transfer

Previous Step

Prev. Step Input

Next Step

Ringing Music for Caller

Announcement for Caller

Announcement for Callee

Announcement Repeat Count: 1

Waiting Duration

Caller ID

Transferstring

Answered By

Diversion Code

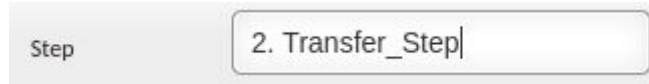
E-mail

Tag


☒ Voice Recording
 ☐ Transfer
 ☐ Busy Tone On Busy

Save Close

-
- Click the “Step” input box, type the desired step name. An example is shown below:

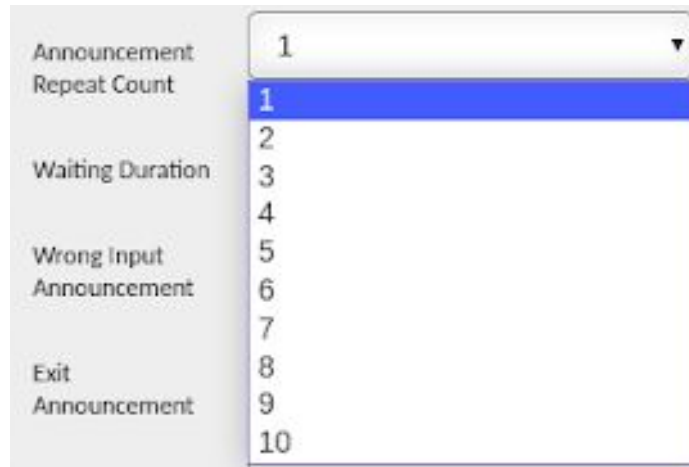
A screenshot of a web interface showing a label 'Step' next to a text input box. The input box contains the text '2. Transfer_Step|'.

- If desired in the “Description” input box, type a description for the step.
- In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
- Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
- In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
- Click the “Ringing Music for Caller,” a dropdown list will appear, select the desired music (Ringing music can be added by request to the Call Center Studio Development Team).
- Click the “Announcement for Caller” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

- Click the “Announcement for Callee” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

11. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a dropdown menu for the 'Announcement Repeat Count' field. The menu is open, displaying a list of numbers from 1 to 10. The number 1 is currently selected and highlighted in blue. The background of the form is light gray, and the dropdown list has a white background with a blue border.


12. Select the desired repeat count.
13. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

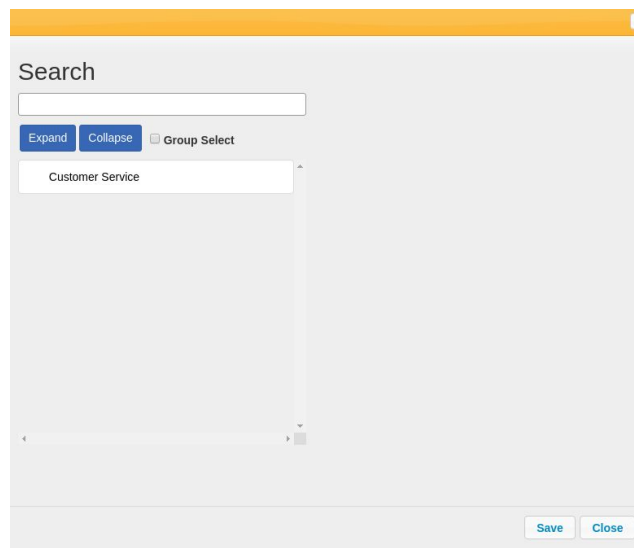


The screenshot shows the 'Waiting Duration' input field. The field is a text box with a light gray border and a light gray background. The number '10' is entered into the field. The label 'Waiting Duration' is positioned to the left of the input box.

14. Click the “Caller ID” input box. A dropdown list will appear with available numbers created in the Dialplan section. (See Dialplan section for more information).
15. Click the “Transfer String” input box, type a transfer string:
(SIP/operator name used / number to be transferred)
16. In the “Answered By,” input box type the desired user’s name.
17. Click the “Diversion Code” dropdown box, type the diversion code. (Code provided by the Telco operator, so that the customer’s actual phone number can be displayed, if desired the Call Center Studio Development team can prepare this).

18. In the “Email” input box, type the desired email addresses to receive notifications regarding the transfer step of the IVR.

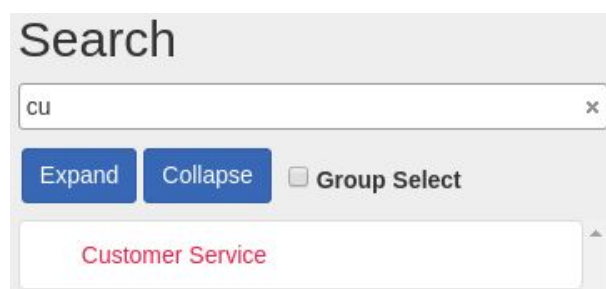
19. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



20. Search for a Tag using the “Search” input box shown below:



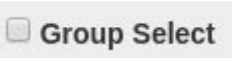
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



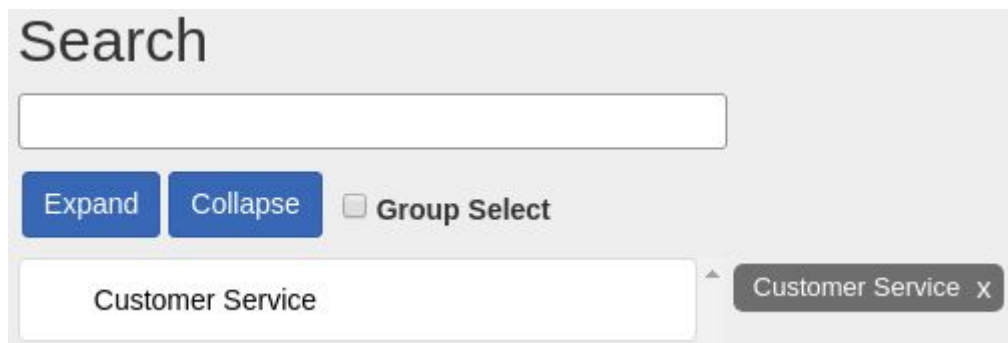
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

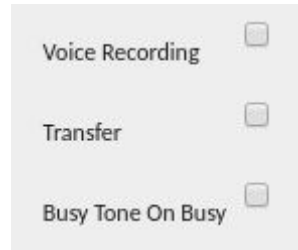
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.


21. Below the tag's input box, the following four checkboxes are displayed:

A screenshot of a user interface showing three checkboxes stacked vertically. Each checkbox is currently unchecked. The labels are "Voice Recording", "Transfer", and "Busy Tone On Busy".

Voice Recording	<input type="checkbox"/>
Transfer	<input type="checkbox"/>
Busy Tone On Busy	<input type="checkbox"/>


The descriptions of these checkboxes are explained below:

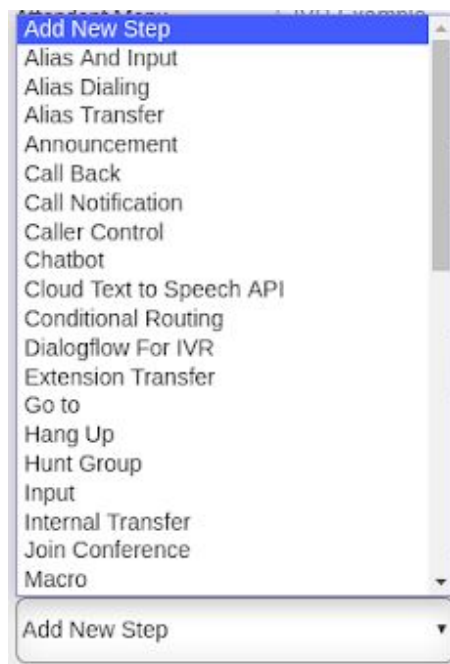
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)
Busy Tone on Busy	It creates a busy tone for the transferee when the person transferred to is on the other line.

22. Click the save button,  .

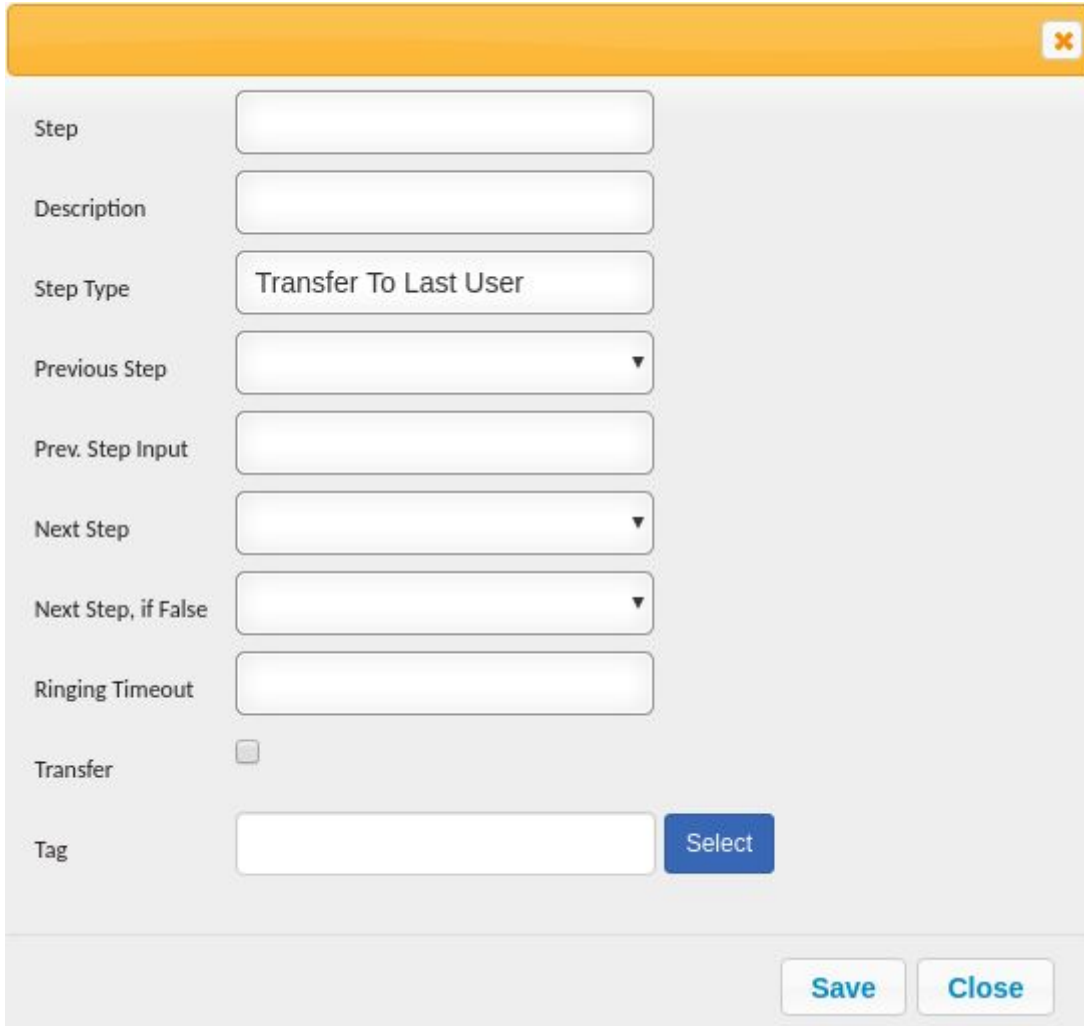
Adding Transfer to Last User Step

The step is used to transfer to the last user without switching to a different step. In cases where the last customer representative is not active, the call is terminated if the next step is not defined, and if defined, it is directed to the selected step. If the caller number has not been connected to a customer representative before, if the call control is wrong, it relates to the next step. If the call cannot be answered by the last user during the ring time, it is transferred to the next step.

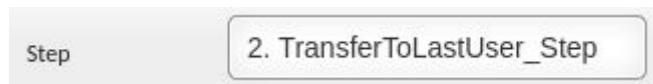
1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Transfer To Last User” step the following pop-up window will appear:




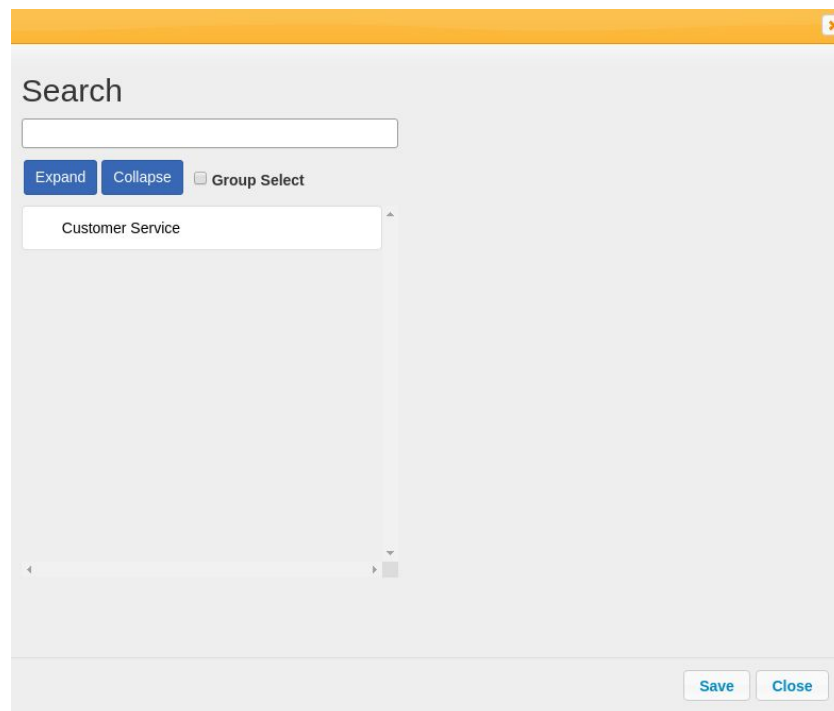
3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
9. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
10. Do not check the “Transfer” checkbox (Used only by the Call Center Studio Development Team).

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

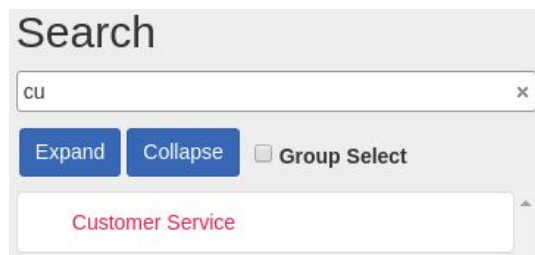


12. Search for a Tag using the “Search” input box shown below:




A search interface with the title "Search" above a text input field.

Note: Partial Tag names can be used for searching purposes all tags with the partial name will have their name appear in red font as shown below:

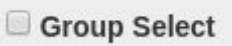


The search interface shows the input "cu". Below the input are buttons for "Expand", "Collapse", and a "Group Select" checkbox. A list below shows "Customer Service" in red text.

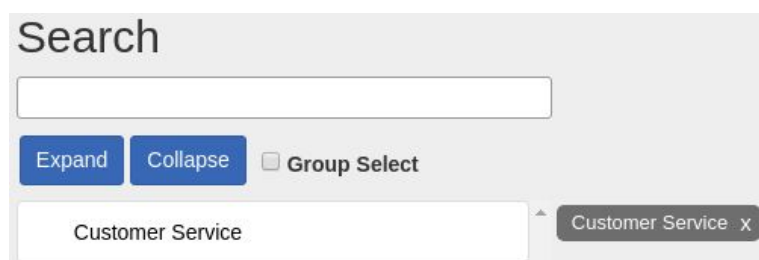
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection


Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:




The search interface shows the input is empty. Below the input are buttons for "Expand", "Collapse", and a "Group Select" checkbox. A list below shows "Customer Service" in black text. To the right of the list is a button that says "Customer Service x".

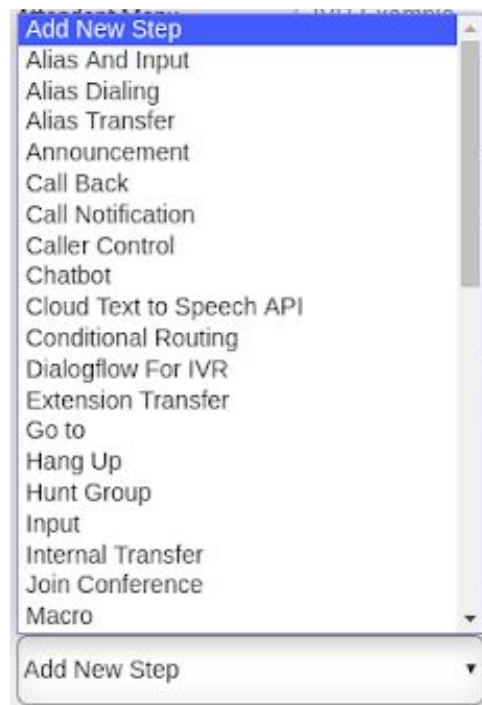
Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Click the save button,  .

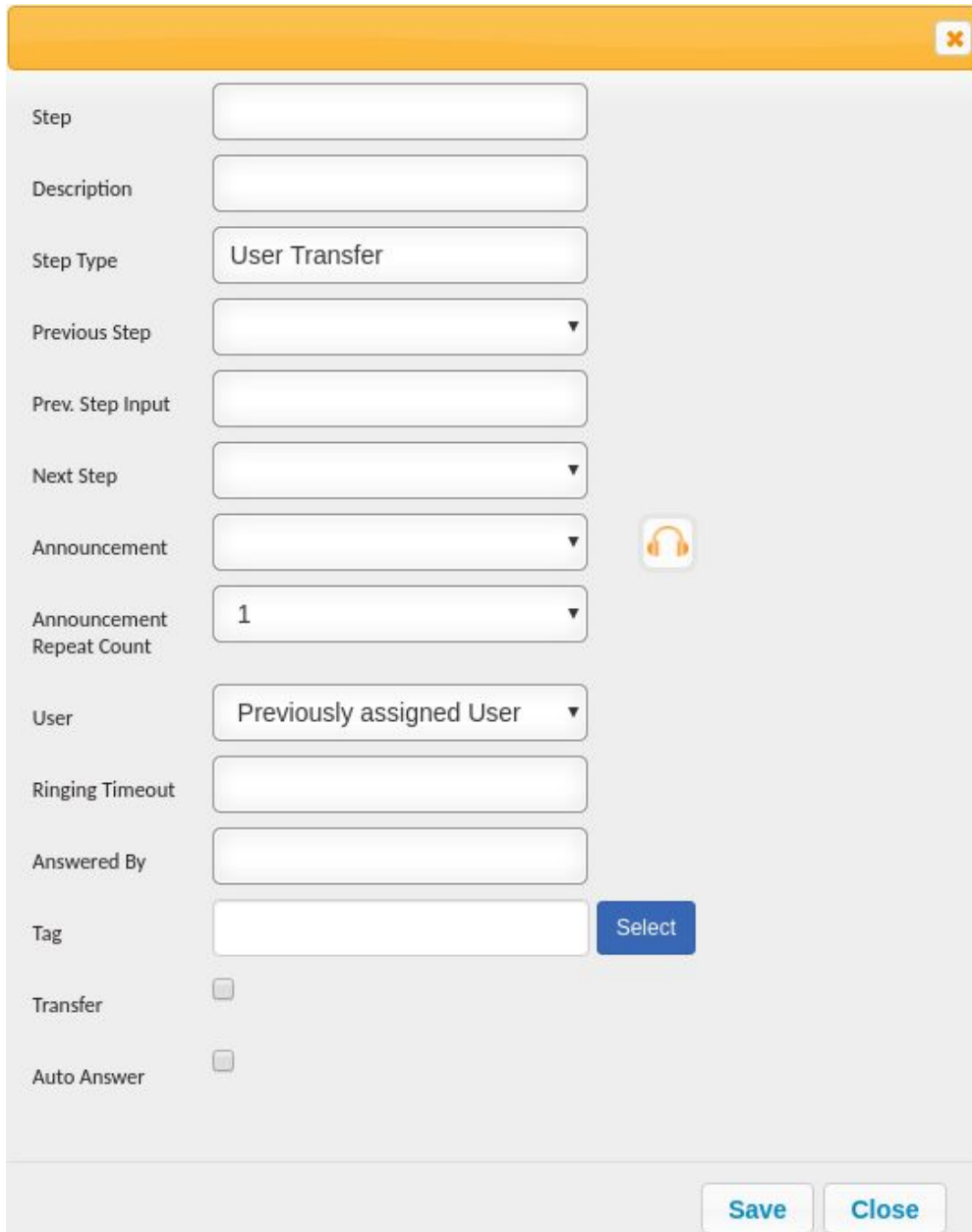
Adding User Transfer Step

It is used to ensure that incoming calls are transferred to the selected user without being assigned to a particular queue. For calls to arrive, the Agent does not need to switch to "available" status, it is sufficient to have default or custom status. If the user is not in the system at the time of the call, the call is transferred to the next step. If the next step is not selected, the call is automatically closed by the system.

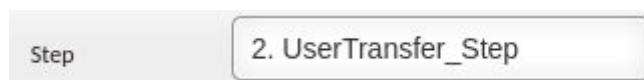
1. Click the “Add New Step” dropdown box,  , the following list will appear:



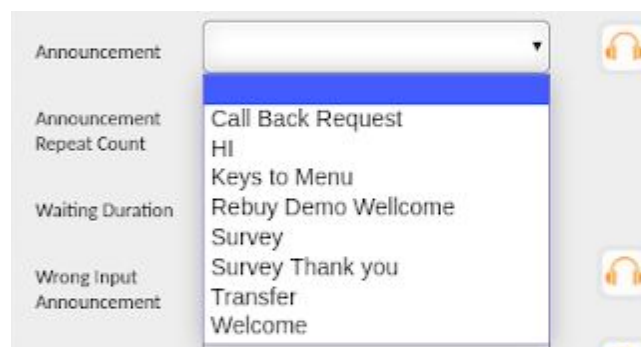
2. Select the “User Transfer” step the following pop-up window will appear:




3. Click the “Step” input box, type the desired step name. An example is shown below:

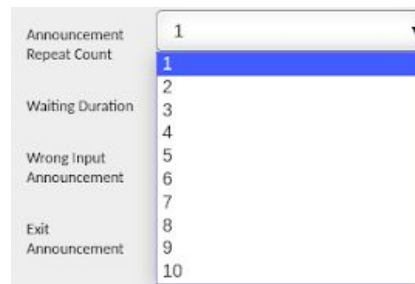


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:




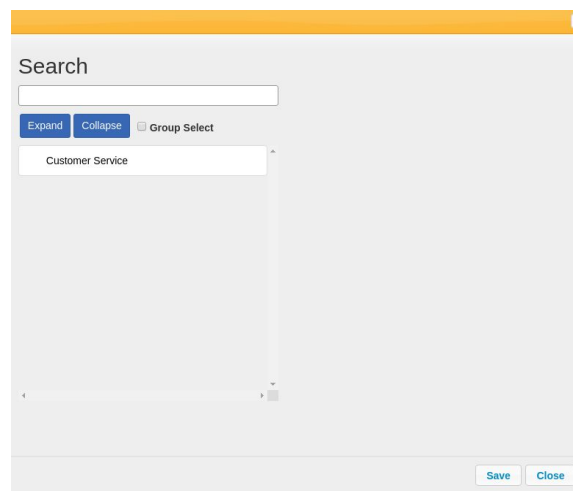
Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a dropdown menu for the 'Announcement Repeat Count' field. The menu is open, displaying a list of numbers from 1 to 10. The number '1' is currently selected and highlighted in blue. The background of the form is light gray, and the dropdown list has a white background with a blue border.

10. Select the desired repeat count.
11. In the “User” dropdown list, select the desired agent to transfer to, or select previously assigned user (used to route the call back to the agent that the customer was previously speaking to).
12. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
13. Check the “Transfer” checkbox if desired.
14. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
15. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

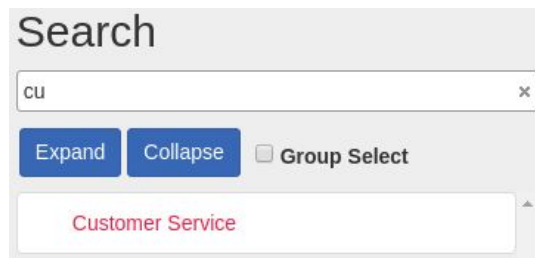


The screenshot shows a pop-up window titled 'Search'. It has a search bar at the top. Below the search bar are three buttons: 'Expand', 'Collapse', and 'Group Select'. The 'Group Select' button is checked. Below these buttons is a list box containing the text 'Customer Service'. At the bottom right of the window are two buttons: 'Save' and 'Close'.

16. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. It features a light gray header with the word "Search" in bold. Below the header is a white input field with a thin gray border. The input field is currently empty.

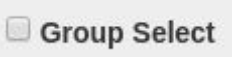
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of the search interface showing results. The "Search" header is at the top. Below it is a search input field containing the text "CU". Underneath the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a list of search results. The first result, "Customer Service", is displayed in red text, indicating a partial match.

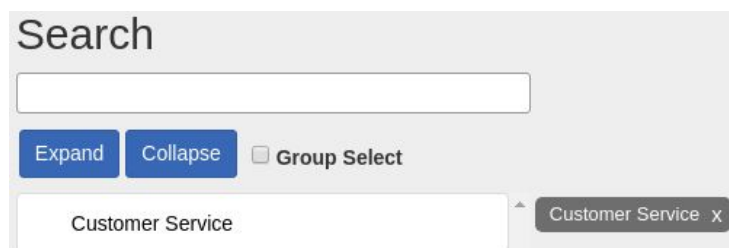
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

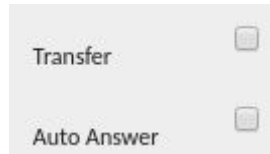
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

A screenshot of the search interface showing results. The "Search" header is at the top. Below it is a search input field. Underneath the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a list of search results. The first result, "Customer Service", is displayed in black text. To the right of the list, there is a tag selection box that also contains the text "Customer Service" and a small "X" icon to its right, indicating that the tag has been selected.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

17. Below the tag's input box, the following two checkboxes are displayed:




Transfer ☐

Auto Answer ☐


The descriptions of these checkboxes are explained below:

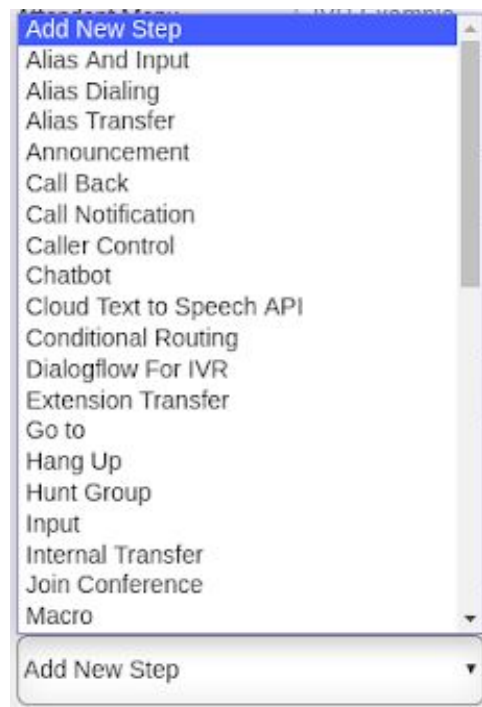
Transfer	Used by the Call Center Studio Development Team (Do not check)
Auto Answer	When transferred allows the user to answer automatically without having to click the answer button.

18. Click the save button, .

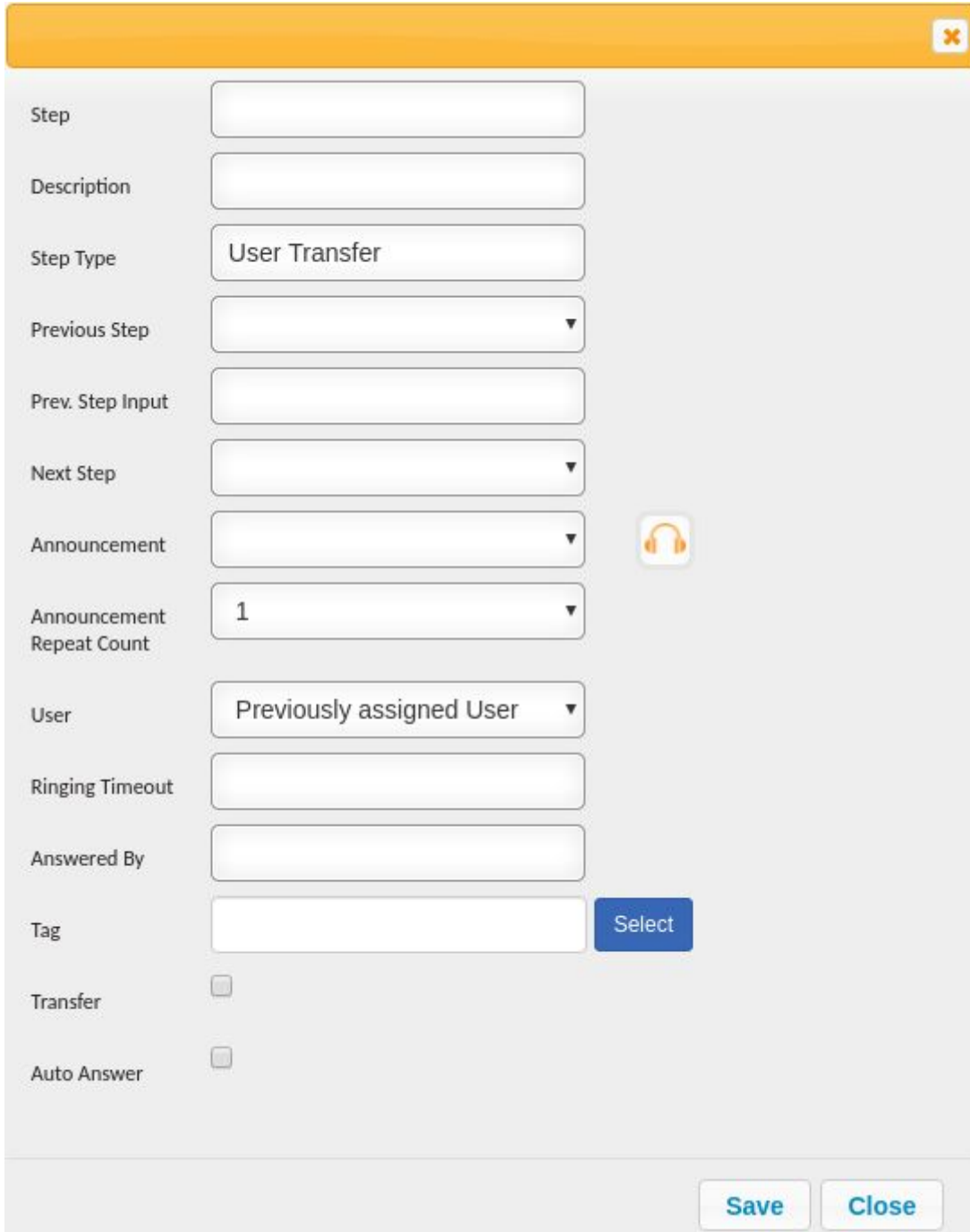
Adding Voicemail Step

When incoming calls are forwarded to this step, voicemails are sent to the specified email address.


1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “User Transfer” step the following pop-up window will appear:

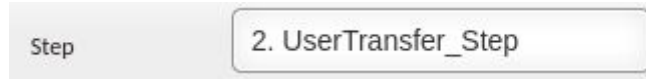


A pop-up window titled "User Transfer" with a close button (X) in the top right corner. The window contains a list of configuration fields for a call step:

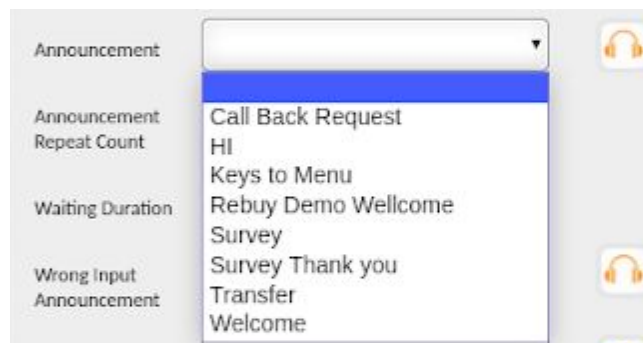
- Step:
- Description:
- Step Type:
- Previous Step: ▼
- Prev. Step Input:
- Next Step: ▼
- Announcement: ▼ 
- Announcement Repeat Count: ▼
- User: ▼
- Ringing Timeout:
- Answered By:
- Tag:
- Transfer: ☐
- Auto Answer: ☐


At the bottom right of the window are two buttons: and .


3. Click the “Step” input box, type the desired step name. An example is shown below:

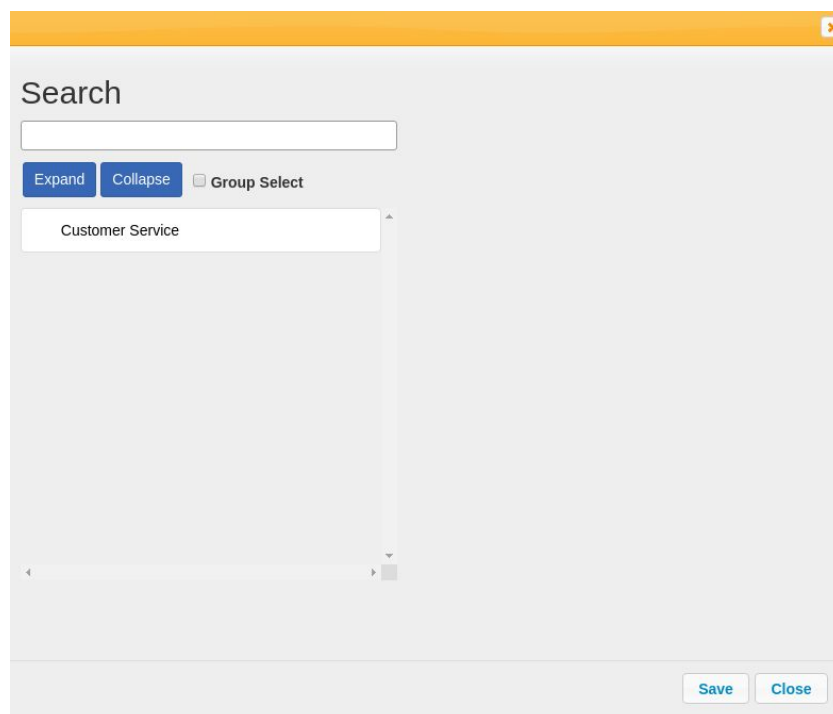


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

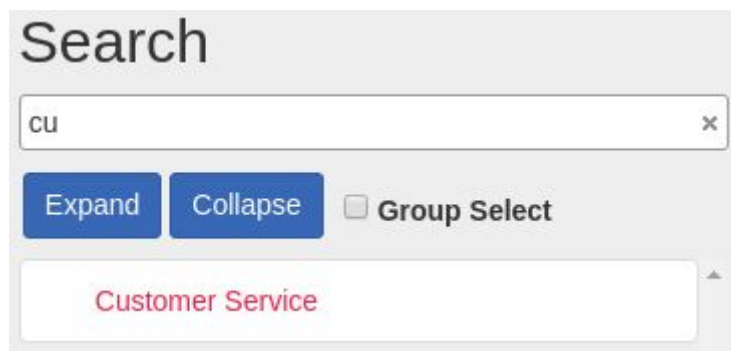
9. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)
10. In the “Input Timeout,” input box type select the timeout duration for the customer input (Seconds).
11. Check the “Exit on DTMF input” checkbox if desired. (When selected allows the customer to choose any number to end the call)
12. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



13. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A vertical cursor is visible at the beginning of the input box.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of a search results interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box containing the text "cu" and a small "x" icon on the right. Below the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a white rectangular box containing the text "Customer Service" in red font.

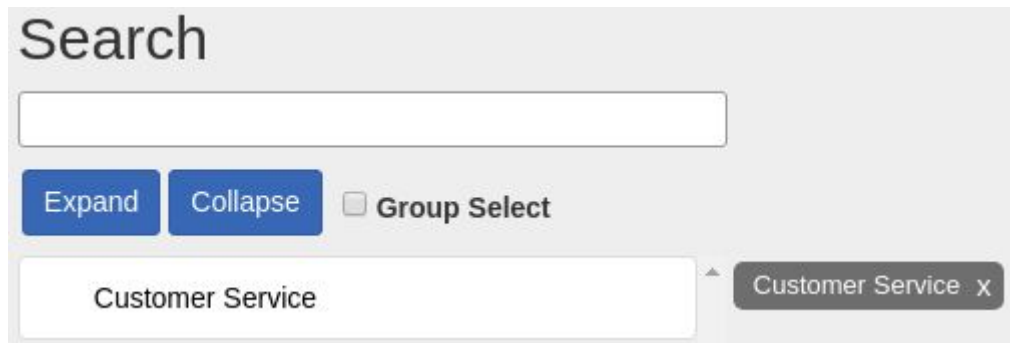
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

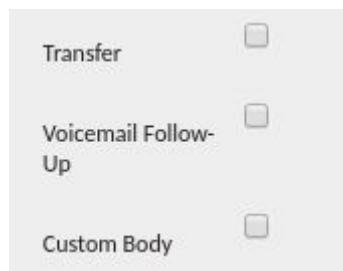
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

14. If desired, click the “Custom Subject” input box type the desired subject for the voicemail email notification.
15. Below the Custom Subject input box, the following checkboxes are displayed:

A screenshot of a form with three checkboxes. The first checkbox is labeled "Transfer". The second checkbox is labeled "Voicemail Follow-Up". The third checkbox is labeled "Custom Body". All three checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)
Voicemail Follow-Up	<p>When checked, the following input box will be displayed:</p> <div data-bbox="804 725 1382 806"> <p>Voicemail Follow-Up Control Time <input type="text"/></p> </div> <p>Type the desired control time. Follow-up will be initiated after the control time has passed.</p>
Custom Body	If checked, the custom body input box will be displayed. Type the desired custom email body message.

16. Click the save button,



Editing an IVR

1. To edit an IVR, click the edit button, , located on the far right of the IVR name after the “Call Limit” column as shown below:

Call Limit ▲ 0  

After clicking the edit button, the IVR window will appear as shown:

✕

Edit Attendant

<p>Attendant Menu <input type="text" value="IVR Example"/></p> <hr/> <p>Call can be transfered in <input type="checkbox"/></p> <p>User Status After Transfer <input type="text" value="wrapup"/></p> <p>Inform the agent if transferred call is hangup <input type="checkbox"/></p> <p>Alias <input type="text"/></p> <p>Credit Card <input type="checkbox"/></p>	<p>Limit is Active <input type="checkbox"/></p> <p>Limit Type <input type="text"/></p> <p>Concurrent Call Limit <input type="text" value="0"/></p> <p>Limit Multiplier <input type="text" value="1"/></p> <p>Overflow Attendant <input type="text"/></p>
---	--


Add New Step

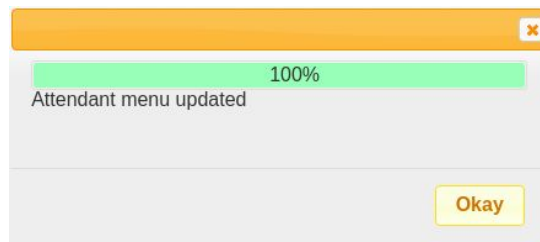
Name ▲	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

Save
Close

2. Make changes as desired.

-
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes

Editing an IVR Step


1. After opening the IVR using the “Editing an IVR” instructions, click the edit button,





, located on the far right of the IVR step name after the “Digit” column as shown below:



2. Make changes as desired.

3. Click the save button, .

Deleting an IVR




1. From the Attendant Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

IVR Example attendant menu will be deleted permanently.
Do you want to continue?

Cancel



OK

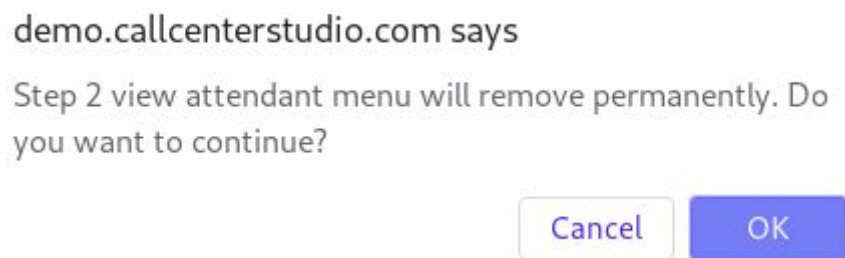
- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .


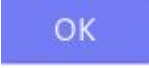
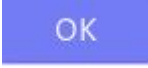
The screen will reload, and the deleted incoming chat will not be shown.

Deleting an IVR Step

Note: The Root Step of any IVR cannot be deleted.

1. From the IVR step list within a selected IVR, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Searching for an IVR Step

1. Click the “Attendant” input box, type the IVR’s name, the input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Attendant" is written in a light gray font. To the right of this text is a white rectangular input field with a thin gray border.


Note: Partial names can be used when spelled correctly.

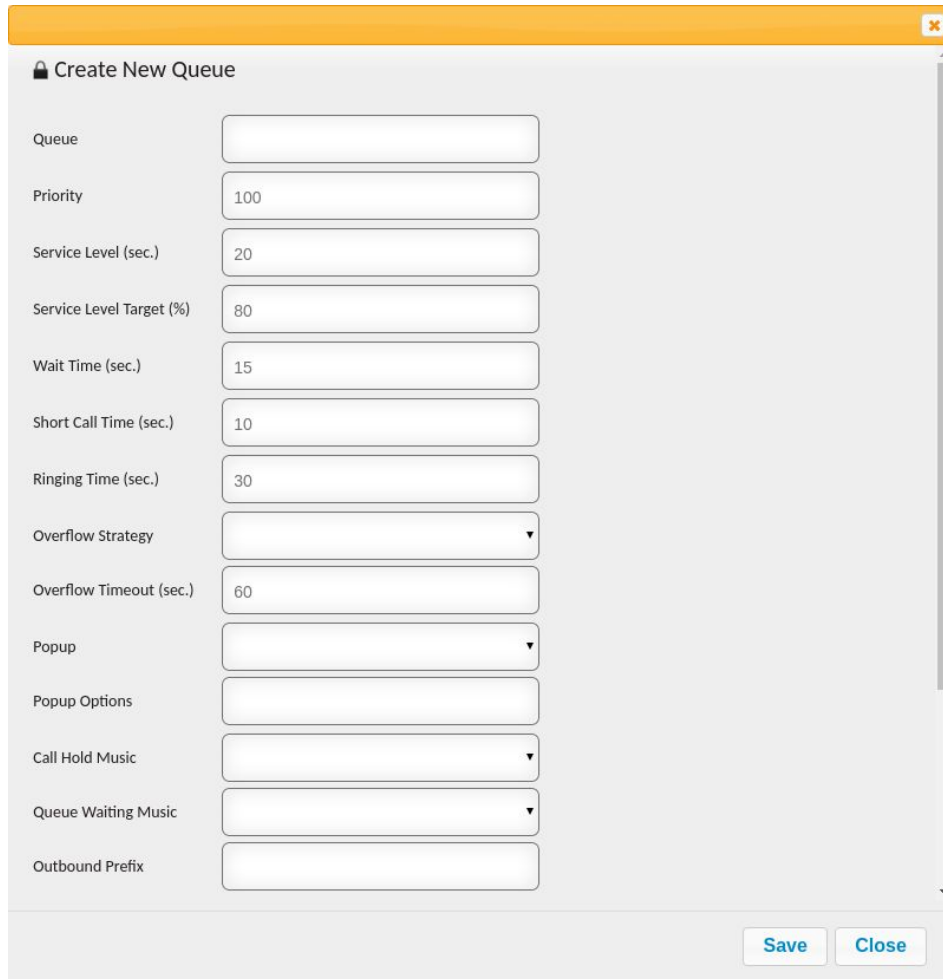
Queues



The queues section is where agent queues can be created, edited, and deleted.

Creating a Queue

1. Click the new button, , in the top right corner the following pop-up screen will appear as shown below:

A screenshot of a 'Create New Queue' pop-up window. The window has a title bar with a close button (X) in the top right corner. The main area contains a list of configuration fields for a queue. The fields are: 'Queue' (text input), 'Priority' (text input with value 100), 'Service Level (sec.)' (text input with value 20), 'Service Level Target (%)' (text input with value 80), 'Wait Time (sec.)' (text input with value 15), 'Short Call Time (sec.)' (text input with value 10), 'Ringing Time (sec.)' (text input with value 30), 'Overflow Strategy' (dropdown menu), 'Overflow Timeout (sec.)' (text input with value 60), 'Popup' (dropdown menu), 'Popup Options' (text input), 'Call Hold Music' (dropdown menu), 'Queue Waiting Music' (dropdown menu), and 'Outbound Prefix' (text input). At the bottom right of the window are two buttons: 'Save' and 'Close'.

1. In the “Queue” input box, type the desired name for the queue.
2. In the “Priority” input box type the desired priority level for the queue. For example, a queue with a priority of 100 will receive top priority for calls, whereas a lower priority number would not.

3. In the “Service Level (sec)” input box type, the desired time frame for the target service level (answered calls/total calls) to be calculated. The default Service Level is shown below:

Service Level (sec.)	20
----------------------	----

4. In the “Service Level Target (%)” (answered calls / total calls) type, the desired service level target percentage. (Default is 80% meaning the target is to answer 80% of the incoming calls within the Service Level (sec) period) . The default is shown below:

Service Level Target (%)	80
--------------------------	----

5. In the “Wait time (sec)” type, the desired wait time. (Wrap-up time frame for agent)

Wait Time (sec.)	15
------------------	----

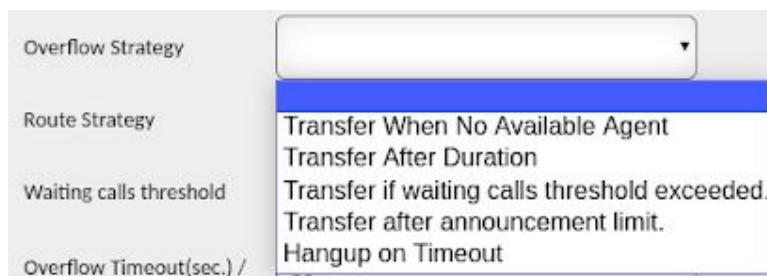
6. The “Short Call Duration (sec)” type the desired time used for calculating whether the call is a short call or not. The default time is shown below:

Short Call Duration (sec.)	10
----------------------------	----

7. In the “Ringing Timeout (sec)” type, the desired ringing timeout. The default time is shown below:

A screenshot of a configuration form. On the left, the text "Ringing Timeout (sec.)" is displayed. To its right is a rectangular input field containing the number "30".

8. In the “Overflow Strategy” dropdown box select from the following options:

A screenshot of a configuration form. On the left, the text "Overflow Strategy" is displayed. To its right is a dropdown menu that is open, showing a list of options: "Transfer When No Available Agent", "Transfer After Duration", "Transfer if waiting calls threshold exceeded.", "Transfer after announcement limit.", and "Hangup on Timeout".

9. In the “Overflow Timeout (sec)” type, the desired timeout time.
10. In the “Popup” dropdown box, if desired, a popup can be added to the queue (See the Web URLs section for creating a selection for a popup).
11. In the “Popup Options” input box, select the desired popup option. (Created using Web URLs section of the tenant)
12. In the “Call Hold Music,” dropdown box select the desired call hold music. (Hold music can be added upon request to the Call Center Studio Team)
13. In the “Queue Waiting Music” dropdown box, select the desired queue waiting music. (Hold music can be added upon request to the Call Center Studio Team)
14. In the “Outbound Prefix” input box type, a unique number for the outbound prefix (Note: can be any number combination not used on another queue outbound prefix).

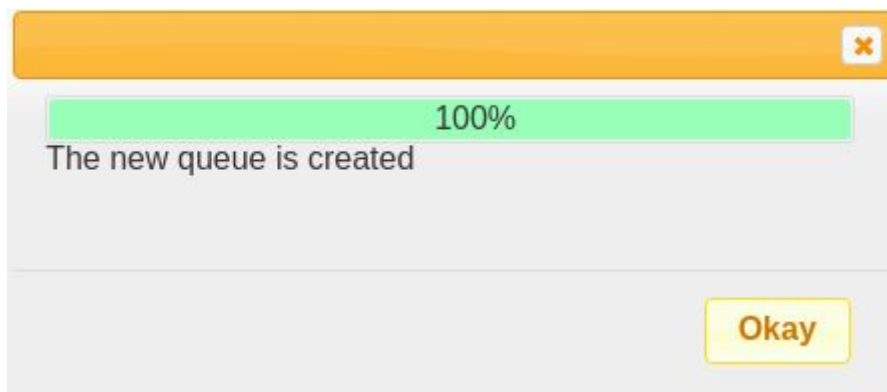
15. In the “Dialplan” dropdown box, select the desired Dialplan (See Dialplans section for creating a dial plan).

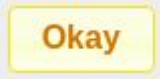
16. Below the “Dialplans” dropdown box, the following checkboxes can be selected.

Their definitions are listed below:

Default	When selected, the agent has to choose the answer button to answer the call.
Auto Answer	When selected, the agent does not have to click the answer button; the call is auto answered.
Tell Queue Order	When selected, the queue order of the caller is announced in the queue every few seconds.


17. Click the save button, . The following pop-up window will appear:



18. Click the okay button, , the newly created queue will be found in the queue list.

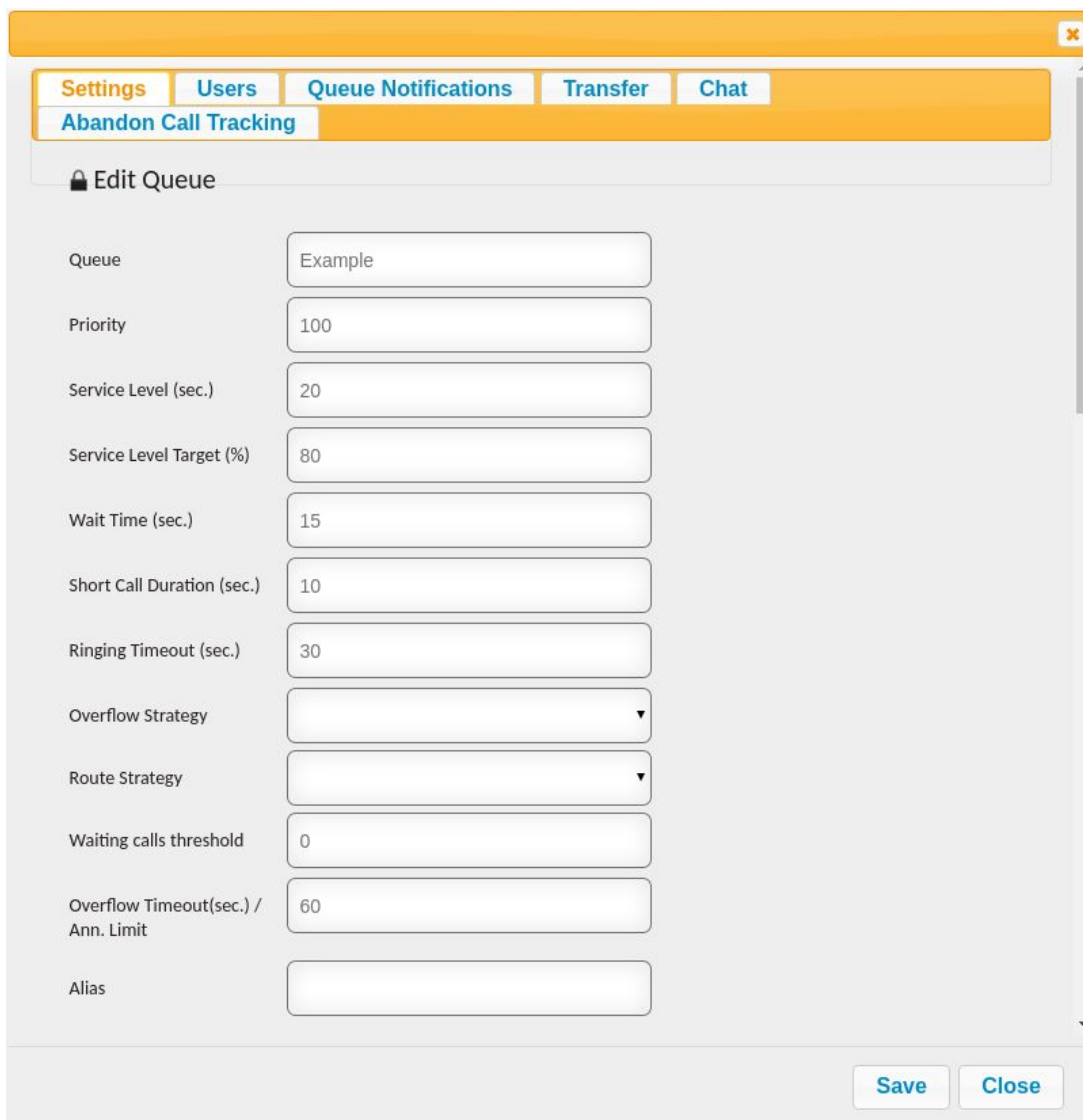
(Note: For more advanced queue settings see below, Editing a queue section for more information)

Editing a Queue

1. To edit a queue, click the edit button, , located on the far right of the IVR name after the “Default” column as shown below:



After clicking the edit button, the queue window will appear as shown:



Edit Queue	
Queue	Example
Priority	100
Service Level (sec.)	20
Service Level Target (%)	80
Wait Time (sec.)	15
Short Call Duration (sec.)	10
Ringing Timeout (sec.)	30
Overflow Strategy	
Route Strategy	
Waiting calls threshold	0
Overflow Timeout(sec.) / Ann. Limit	60
Alias	

Save Close

The following tabs listed at the top of the pop-up window are explained in detail below:

Settings Tab

1. In the “Queue” input box, type the desired name for the queue.
2. In the “Priority” input box type the desired priority level for the queue. For example, a queue with a priority of 100 will receive top priority for calls, whereas a lower priority number would not.
3. In the “Service Level (sec)” input box, type the desired time frame for the target service level (answered calls/total calls) to be calculated. The default Service Level is shown below:

Service Level (sec.)

20

4. In the “Service Level Target (%)” (answered calls / total calls) type, the desired service level target percentage. (Default is 80% meaning the target is to answer 80% of the incoming calls within the Service Level (sec) period) . The default is shown below:

Service Level Target (%)

80

5. In the “Wait time (sec)” type, the desired wait time. (Wrap-up time frame for agent)

Wait Time (sec.)

15

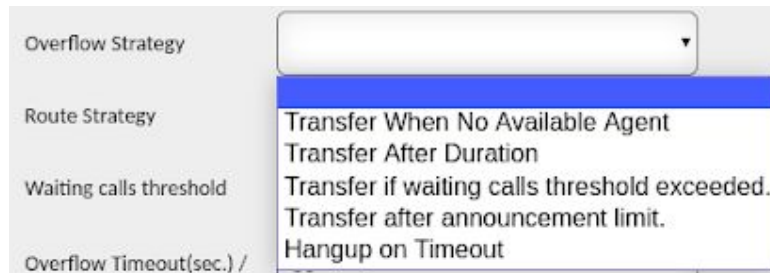
-
6. The “Short Call Duration (sec)” type the desired time used for calculating whether the call is a short call or not. The default time is shown below:

Short Call Duration (sec.)	<input type="text" value="10"/>
----------------------------	---------------------------------

7. In the “Ringing Timeout (sec)” type, the desired ringing timeout. The default time is shown below:

Ringing Time (sn)	<input type="text" value="30"/>
-------------------	---------------------------------

8. In the “Overflow Strategy” dropdown box, select from the following options:



The following overflow strategies are explained in detail below:

Transfer When No Available Agent	Transfers when no available agent is available.
Transfer After Duration	Transfers call after duration.
Transfer if the waiting calls threshold exceeded.	Transfers waiting calls if the threshold is exceeded.
Transfer after the announcement limit.	Transfers call after the announcement limit.
Hangup on Timeout	Hangup calls after the timeout.

9. In the “Route Strategy” dropdown box, select from the following options:



The following overflow strategies are explained in detail below:

FIFO	Calls are held in the queue and answered based on a First In First Out strategy.
LIFO	Calls are held in the queue and answered based on a Last In First Out strategy.

10. In the “Waiting Calls Threshold” input box, type the desired waiting calls threshold.

11. In the “Overflow Timeout(sec.) / Ann. Limit” input box, type the desired input.

12. In the “Alias” input box, if desired, an alias number (extension) can be assigned to the queue.

13. In the “Popup” dropdown box, if desired, a popup can be added to the queue (See the Web URLs section for creating a selection for a popup).

14. In the “Popup Options” input box, type the desired popup option.

15. In the “Ringing Trigger” dropdown box, if desired, a popup can be added to the queue as a ringing trigger (See the Web URLs section for creating a selection for a popup).

16. In the “No Answer Trigger” dropdown box, if desired, a popup can be added to the queue as a no answer trigger (See the Web URLs section for creating a selection for a popup).
17. In the “Hangup Trigger” dropdown box, if desired, a popup can be added to the queue as a hangup trigger (See the Web URLs section for creating a selection for a popup).
18. In the “When Call Enters Queue” dropdown box, if desired, a popup can be added to the queue. When the call enters the queue it would be triggered (See the Web URLs section for creating a selection for a popup).
19. Below the “When Call Enters Queue” dropdown box, the following checkboxes can be selected:



The checkbox descriptions are defined below:

Trigger Popup As Service	This setting is used when the CRM is not browser-based.
Open in The Same Popup	Opens pop-up in a new tab.
Send Popup Event	Sends all pop-ups from the queue to the browser as an event message.

-
20. In the “Call Hold Music,” dropdown box select the desired call hold music.
 21. In the “Queue Waiting Music” dropdown box, select the desired queue waiting for music.
 22. In the “Outbound Prefix” input box, type the desired outbound prefix. (Can be any number, but the same number cannot be used in different queues)
 23. The following checkboxes can be selected if desired. They are explained below:

Default	Makes the queue the default queue when checked.
Auto Answer	When checked, during an incoming call, the agent does not have to select “Answer” to be connected with the customer.

24. In the “Auto Answer Delay(sec)” dropdown box, if the “Auto Answer” checkbox is checked, select the desired time delay for the auto-answer.
25. Check the “Tell Queue Order” checkbox if desired. (Tells the customer there queue number)
26. In the “Tell Queue Order Repeat Period(s)” input, if the “Tell Queue Order” checkbox was checked, type the desired time in seconds for the queue number to be repeated to the customer.

27. In the “Upper Limit For Queue Order” input box, if the “Tell Queue Order” checkbox was checked, this input box allows an upper limit to be placed on the queue order. For example, 60 customers could be waiting in a queue, but if the “Upper Limit For Queue Order” number is 20, the max number that will be announced to the customer will be 20.

28. In the “Wrapup Codes” dropdown box, a wrapup code can be selected as a default for each call within the queue, if desired.


29. Below the “Wrapup Codes” dropdown box, the following checkboxes can be selected.

They are explained below:

Ask Wrapup Code	If checked, a pop-up window will appear, allowing the agent to select a wrapup code for the call.
Do Not Ask Wrapup Code For Unanswered Outgoing Calls	If check, the wrapup code pop-up window will not appear for unanswered outgoing calls.

30. In the “Location” dropdown box, if locations were created, a location can be selected for the queue. (See more information in the “Location” section)

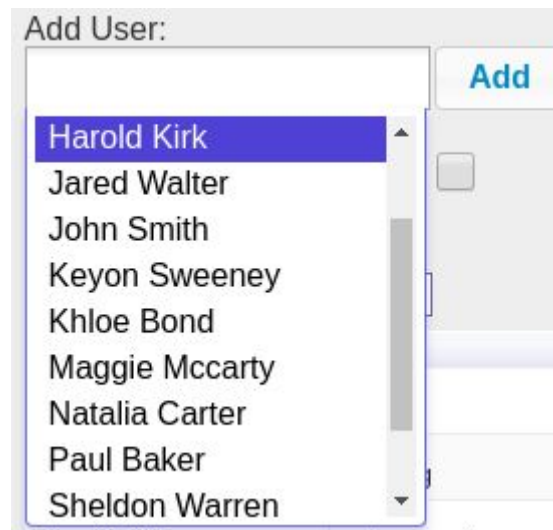
31. If desired, the “Play Agent Announcement On Call Connected” checkbox can be selected, which will play the Agent Announcement on the connected call.

32. Once the desired changes have been made, click the “Save” button,  .

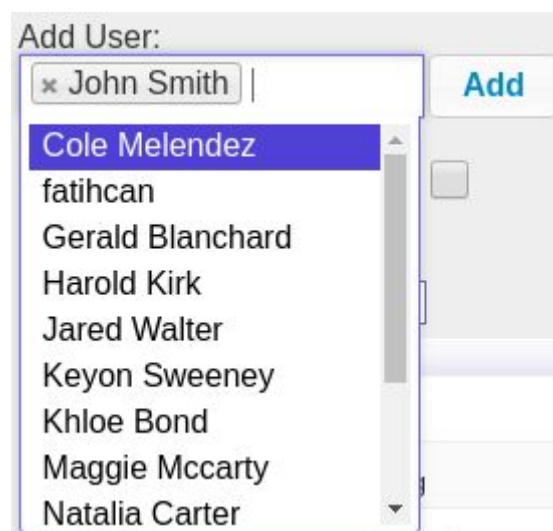
Users Tab


Adding a User to a Queue


1. Click the “Add User” input box, a dropdown list will appear with active users. An example is shown below:

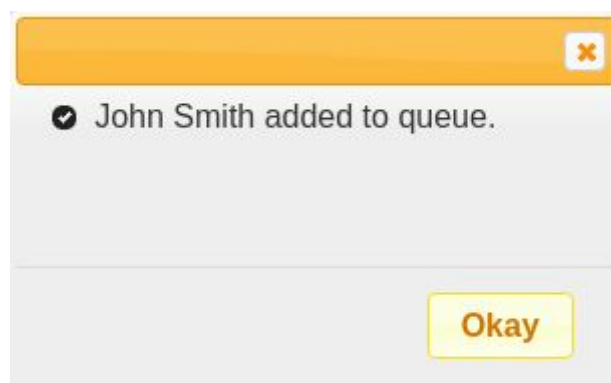



2. Use the scroll bar or directly type the user's name, then click the desired user. An example is shown below:




Note: Multiple users can be selected, as shown above, before adding them to the queue. To deselect a user, simply click the X, , to the left of the user's name.

3. Click the “Priority” input box located to the right of the “Add User” input box, type the desired priority level. For example, a user with a priority of 100 will receive top priority for calls, whereas a lower priority number user would not. This feature is primarily used for skills-based routing.
4. After the desired user(s) have been selected, click the add button, . The following pop-up window will appear showing the added users:




5. Click the okay button, . The added user will appear in the user list, as shown below:

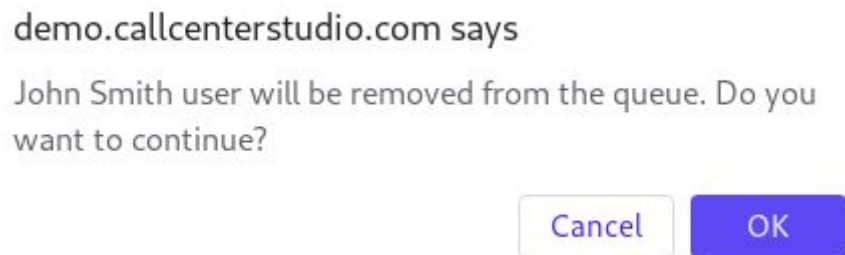
User Name ▲	Status	Priority	
John Smith	notanswering	100	


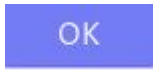
< >

Note:

The priority Level for the user can be adjusted by clicking the “Priority” input box, located to the right of the user’s status in the User Name list.

A user can be deleted From the User Name list by clicking the delete button, , located to the right of the user’s priority level. When the delete button is clicked the following pop-up will appear:



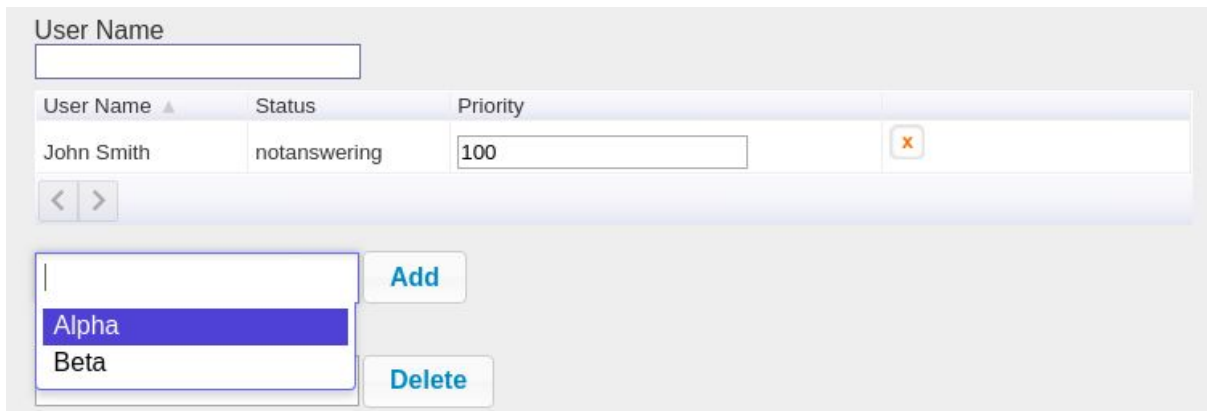
- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted user will not be shown.

Adding a Team to a Queue

1. Click the “Add Team” input box. A dropdown list will appear with active teams. An example is shown below:



User Name

User Name ▲	Status	Priority	
John Smith	notanswering	100	X

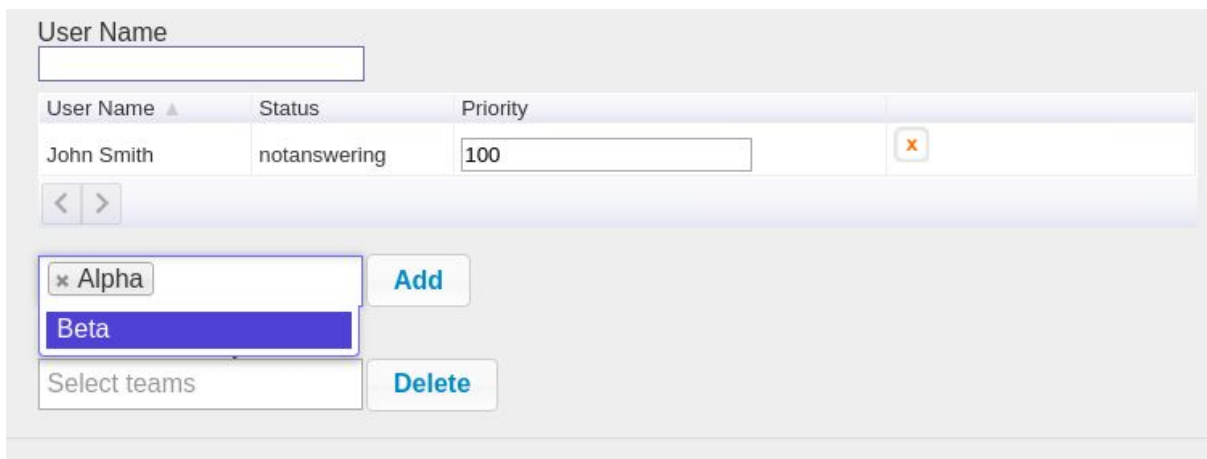
< >

Alpha
Beta

Add

Delete

2. Use the scroll bar or directly type the team’s name, then click the desired team. An example is shown below:



User Name

User Name ▲	Status	Priority	
John Smith	notanswering	100	X

< >


X Alpha
Beta

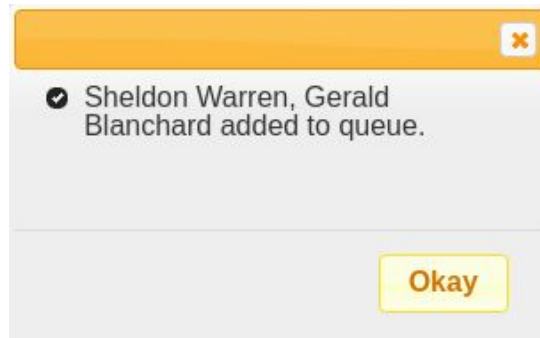
Select teams


Add

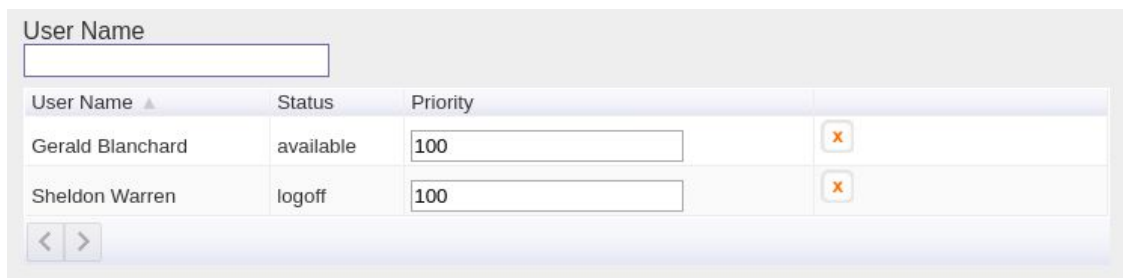
Delete

Note: Multiple users can be selected, as shown above, before adding them to the queue. To deselect a user, simply click the X, X, to the left of the user’s name.



3. After the desired team(s) have been selected, click the add button, . The following pop-up window will appear showing the names of the team members that have been added as shown below:



4. Click the okay button, . The added users will appear in the user list, as shown below:




User Name

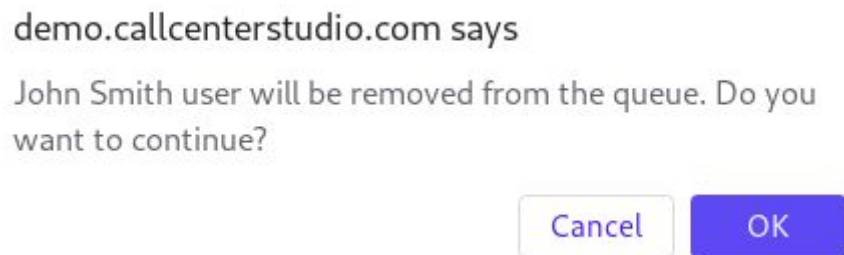
User Name ▲	Status	Priority	
Gerald Blanchard	available	100	
Sheldon Warren	logoff	100	


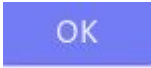
< >

Note:

The priority Level for the users can be adjusted by clicking the “Priority” input box, located to the right of the user’s status in the User Name list.

A user can be deleted From the User Name list by clicking the delete button, , located to the right of the user’s priority level. When the delete button is clicked, the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

Confirm the deletion by clicking the OK button, .

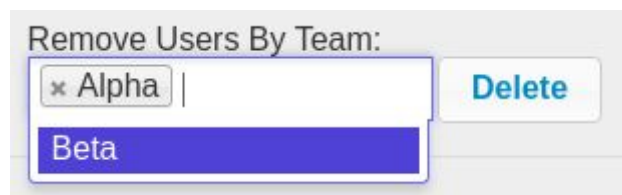
The screen will reload, and the deleted user will not be shown.


Removing Users by Team from a Queue

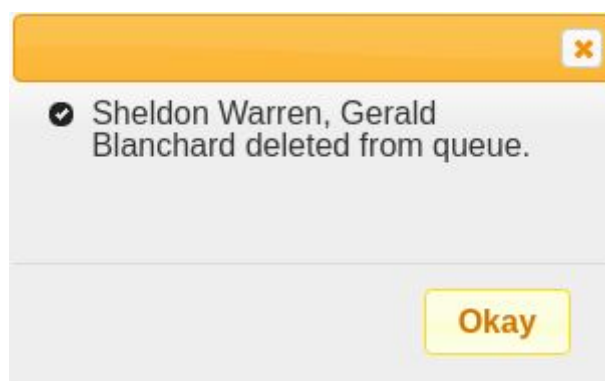
1. Click the “Remove Users By Team:” input box, a dropdown list will appear with active teams. An example is shown below:

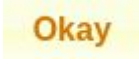


2. Use the scroll bar or directly type the team's name, then click the desired team. An example is shown below:



3. After the desired teams have been selected, click the delete button, , The following pop-up window will appear showing the deleted users:




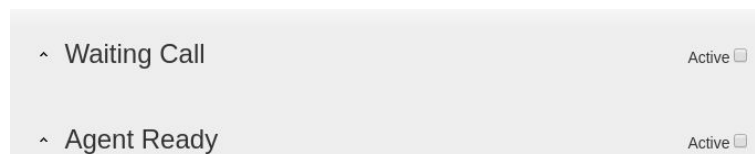
-
4. Click the okay button, . The removed users will be removed from the User Name List.

Notifications Tab


The notifications tab is used to disseminate notifications to agents based on Waiting Call or Agent thresholds being exceeded.

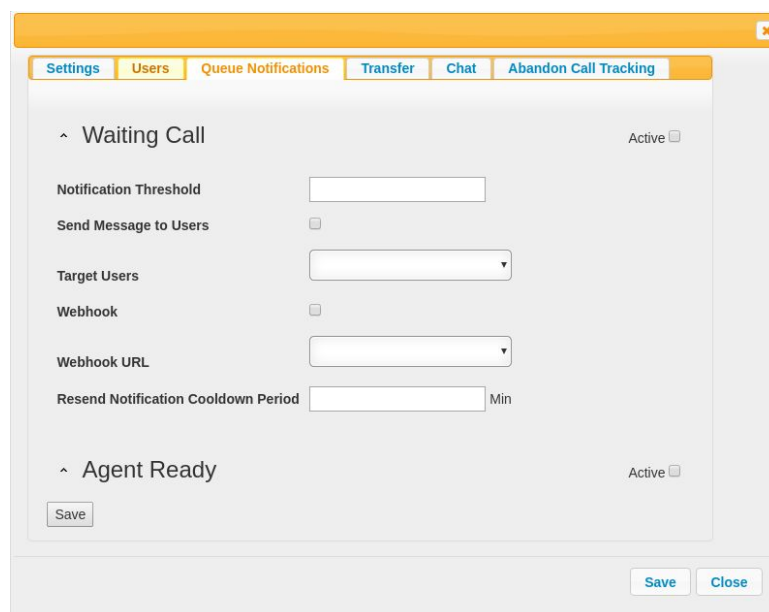
Note for any queue notification to occur using either the Waiting Call Notification or Agent

Ready Notification, the Active checkbox,  , must be checked. It is located to the right of each notification title, as shown below:

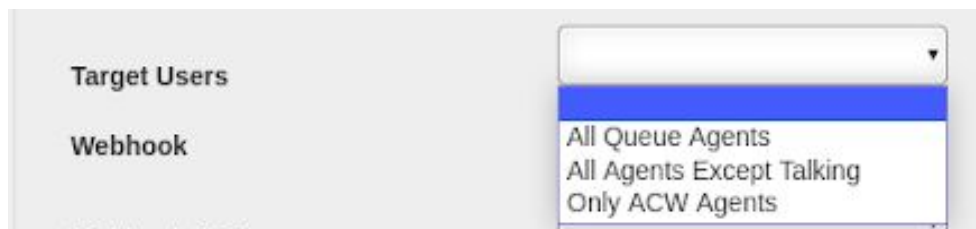


Waiting Call Notification

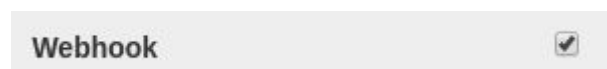
1. Click the chevron,  , located to the left of “Waiting Call,” the selection will expand as shown below:




2. Click the “Notification Threshold” type the desired number of waiting calls until the notification occurs.
3. If desired, click the “Send Message to Users” checkbox. (If checked, the agents will receive a notification regarding the waiting call threshold.
4. If the “Send Message to Users” checkbox is checked, the Target Users dropdown box can be clicked to choose which users to send the notification to. The following image shows the dropdown box options:

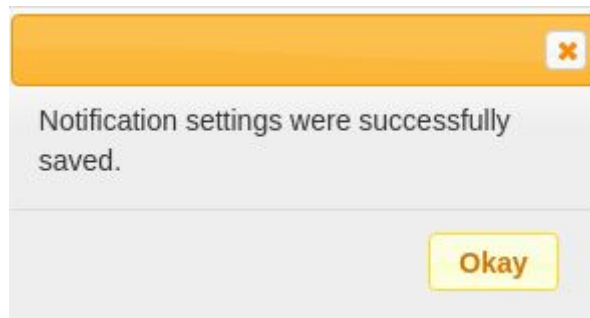



5. Select the desired option.
6. A webhook can be added to the waiting call notification. Check the “Webhook” checkbox, as shown below:




7. After the “Webhook” checkbox is checked, click the “Webhook URL” dropdown box, a list of available Webhook URL options is available (For creating additional options see the “Web URL” section).
8. In the “Resend Notification Cooldown Period” input box, type the desired time for the cooldown period (minutes).

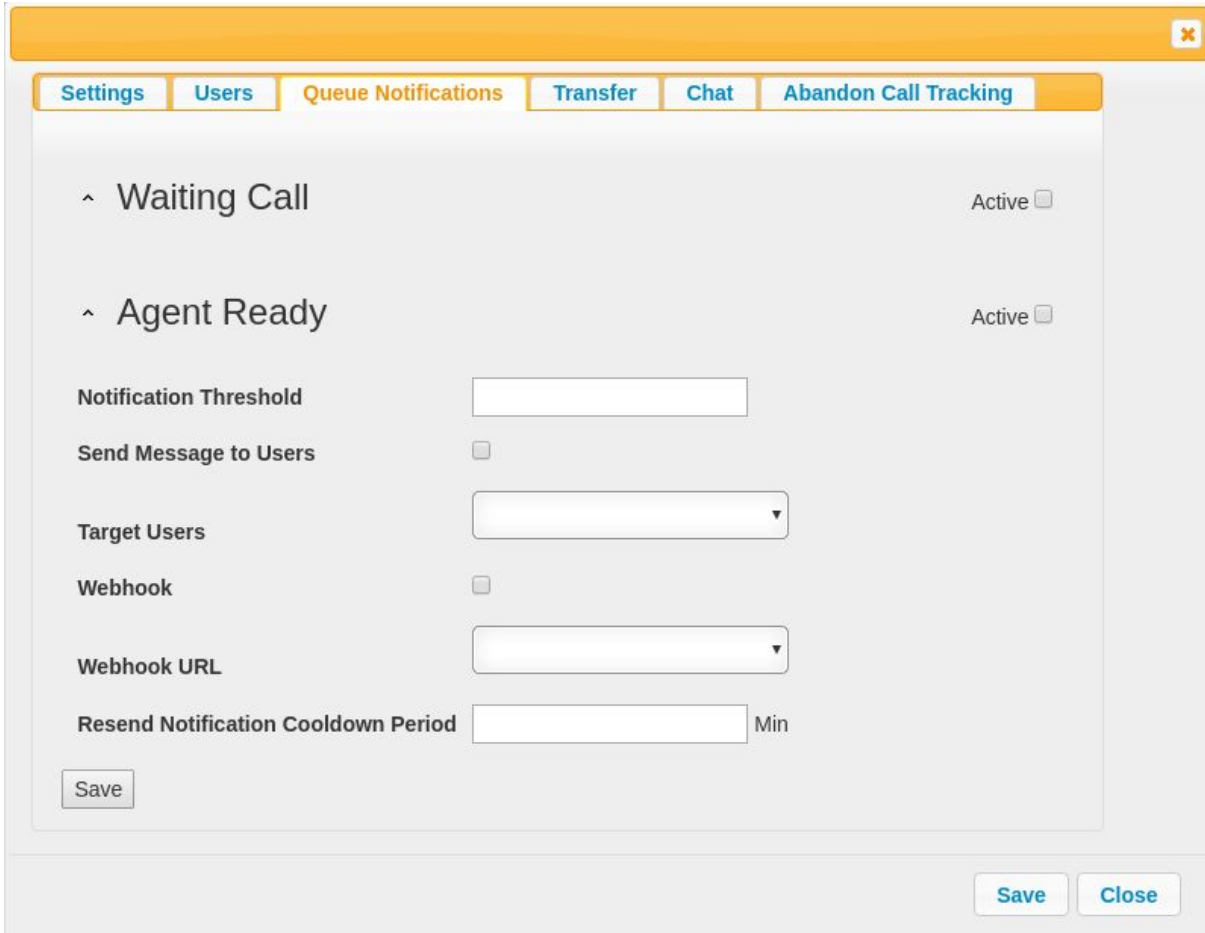
9. After Desired changes have been made, click the save button, , the following pop-up window will appear:



10. Click the Ok button, .

Agent Ready Notification

1. Click the chevron, , located to the left of “Agent Ready,” the selection will expand as shown below:



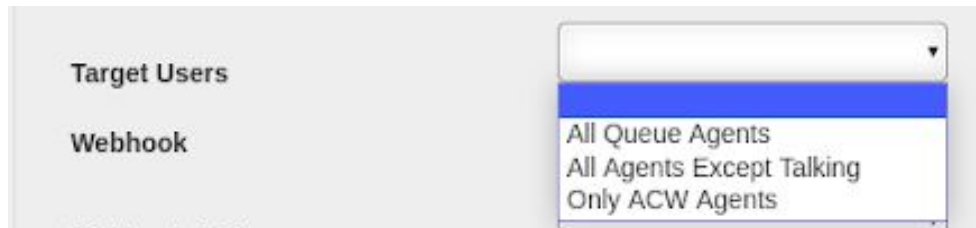
The screenshot shows the 'Queue Notifications' settings window. The 'Agent Ready' section is expanded, revealing the following configuration options:

- Waiting Call**: Active ☐
- Agent Ready**: Active ☐
- Notification Threshold**:
- Send Message to Users**: ☐
- Target Users**:
- Webhook**: ☐
- Webhook URL**:
- Resend Notification Cooldown Period**: Min

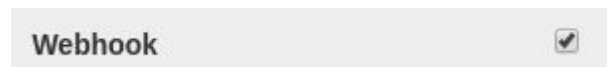
Buttons: Save (bottom left), Save (bottom right), Close (bottom right).

2. Click the “Notification Threshold” type the desired number of waiting calls until the notification will occur.
3. If desired, click the “Send Message to Users” checkbox. (If checked, the agents will receive a notification regarding the waiting call threshold.)


4. If the “Send Message to Users” checkbox is checked, the Target Users dropdown box can be clicked to choose which users to send the notification to. The following image shows the dropdown box options:

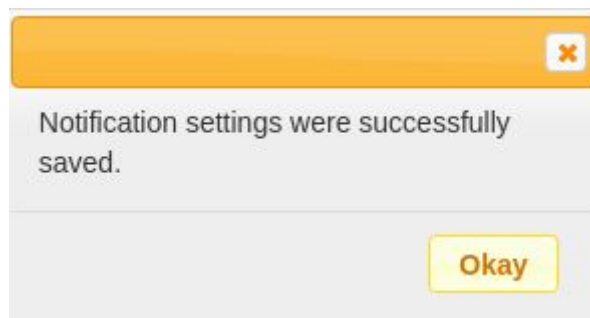


5. Select the desired option.
6. A webhook can be added to the waiting call notification. Check the “Webhook” checkbox, as shown below:



7. After the “Webhook” checkbox is checked, click the “Webhook URL” dropdown box, a list of available Webhook URL options is available (For creating additional options see Web URL section).
8. In the “Resend Notification Cooldown Period” input box, type the desired time for the cooldown period (minutes).

9. After Desired changes have been made, click the save button, , the following pop-up window will appear:




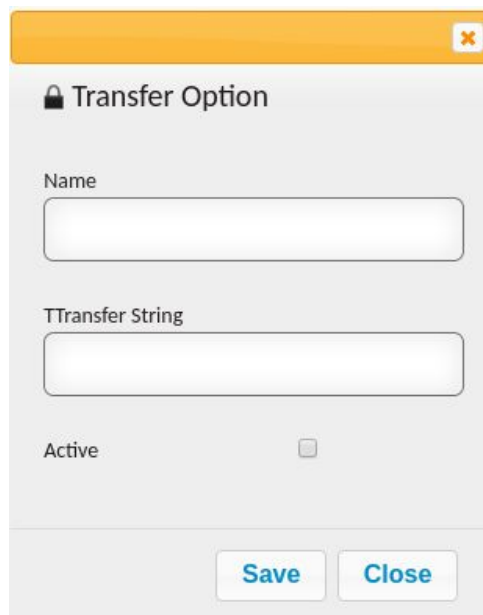
10. Click the Ok button, .

Transfer Tab

The transfer tab is used to add direct user's lines using a transfer string to the queue (If the overflow strategy is set for transfer).

Adding a Transfer


1. Click the Add button located in the top right-hand corner of the transfer tab. . The following pop-up will appear:





The image shows a pop-up window titled "Transfer Option" with a lock icon. It contains three input fields: "Name", "TTransfer String", and "Active" (a checkbox). At the bottom, there are "Save" and "Close" buttons.

2. Click the "Name" input box, type the name of the person that the call will be transferred to.
3. Click the "Transfer String," type a transfer string using the following format:



SIP/Gateway Name/transfer phone number

4. Select "Active."
5. Click the save button, .

Editing a Transfer

1. Click the edit button, , located to the far right of the transfer name.
2. Make the necessary changes.
3. Click the save button, .

Deleting a Transfer


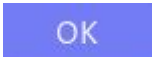
1. From the Transfer name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

John Smith view transfer option will be deleted. Do you want to continue?

Cancel

OK

- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted transfer will not be shown.

Chat Tab

The chat tab is used to enable the chat feature for the queue, and to manage the ringing timeout setting.

1. To enable chat, check the “Enable Chat” checkbox, as shown below:

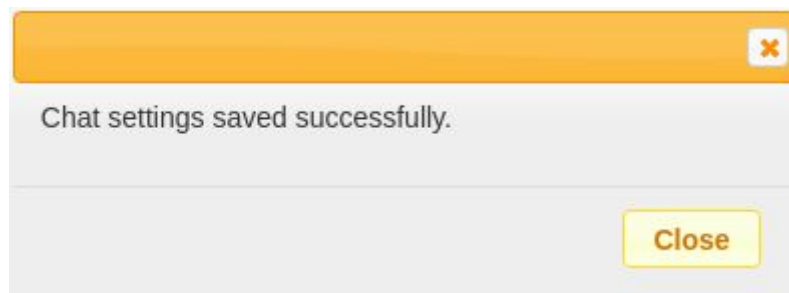



2. Click the “Ringing Timeout” input box, type the desired ringing timeout (seconds).

The default is shown below:



3. Click the save button, located under the “Ringing Timeout” input box. The following pop-up window will appear:

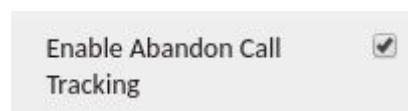


4. Click the close button, .

Abandon Call Trafficking Tab

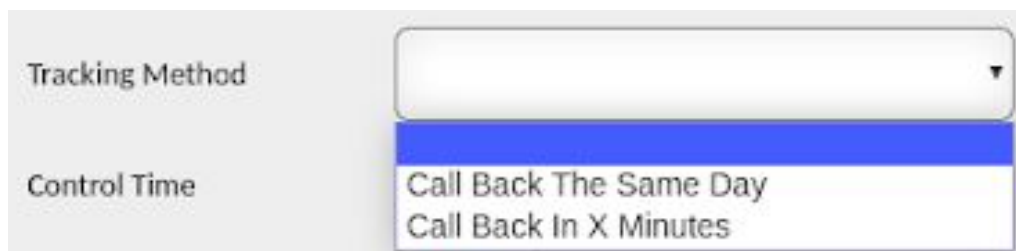
The abandoned call trafficking tab is used to enable tracking of abandoned calls and to manage the tracking method.

1. To enable abandon call trafficking, check the “Enable Abandon Call Tracking” input box, as shown below:



Enable Abandon Call Tracking ☒

2. Click the “Tracking Method” dropdown box. The following selections can be made:



Tracking Method

Control Time

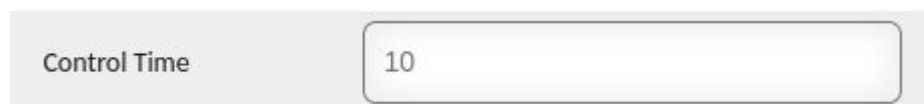
Call Back The Same Day

Call Back In X Minutes

Note: If “Call Back The Same Day” was selected. No further settings need to be adjusted.


Simply click the save button, , located under the “Control Time” input box.

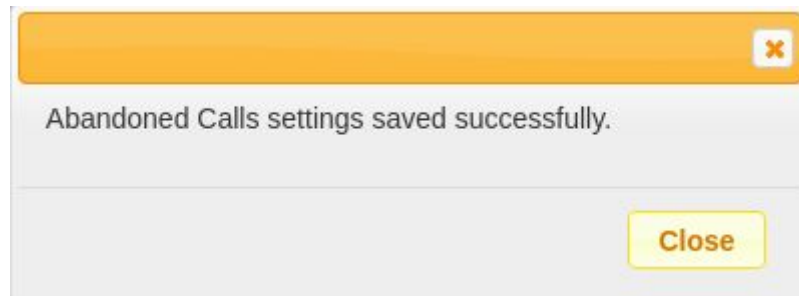
3. If “Call Back In X Minutes” was selected, click the “Control Time” and input the “X” value (minutes). An example is shown below:




Control Time

10

-
4. Click the save button, , located under the “Control Time” input box. The following pop-up window will appear:



5. Click the close button, .

Deleting a Queue

1. From the Queue Name list, click the delete button, , to the right of the edit button,




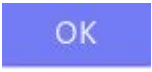
. When the delete button is clicked, the following pop-up will appear:

demo.callcenterstudio.com says

Example queue will be deleted permanently. Do you want to continue?

Cancel

OK

- Select the cancel button, , will cancel the deletion.
- Select the OK button, , will confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted queue will not be shown.

Searching for a Queue

1. Click the “Queue” input box, type the queue’s name. The input box is shown below:


Queue

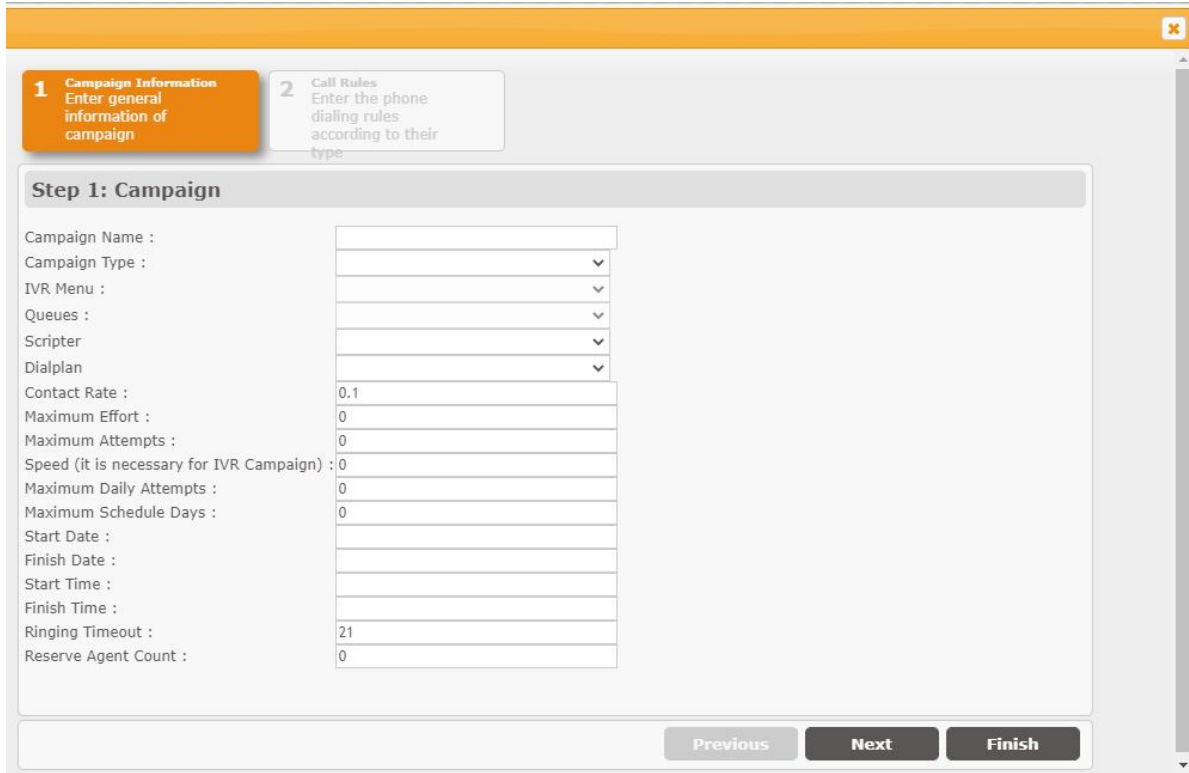
Note: Partial names can be used when spelled correctly.

Campaigns



Adding a Campaign

1. Click the add button, , located on the top right corner of the screen. The following pop-up will appear:



1 Campaign Information
Enter general information of campaign

2 Call Rules
Enter the phone dialing rules according to their type

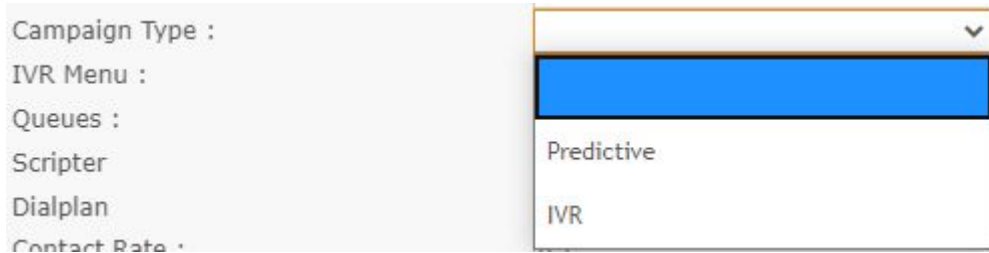
Step 1: Campaign

Campaign Name :	<input type="text"/>
Campaign Type :	<input type="text"/>
IVR Menu :	<input type="text"/>
Queues :	<input type="text"/>
Scripter :	<input type="text"/>
Dialplan :	<input type="text"/>
Contact Rate :	0.1
Maximum Effort :	0
Maximum Attempts :	0
Speed (It is necessary for IVR Campaign) :	0
Maximum Daily Attempts :	0
Maximum Schedule Days :	0
Start Date :	<input type="text"/>
Finish Date :	<input type="text"/>
Start Time :	<input type="text"/>
Finish Time :	<input type="text"/>
Ringing Timeout :	21
Reserve Agent Count :	0

1. Click the “Campaign Name” input box, type the desired campaign name. An example is shown below:

Campaign Name :

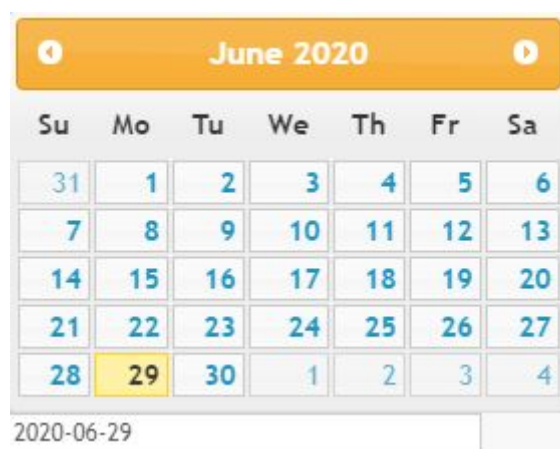
- Click the “Campaign Type” dropdown box the following selections will appear:



Predictive	A campaign that uses the scripter and agents answer outbound calls performed by the campaign’s assigned dialer. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

- Select “Predictive” or “IVR” whichever is desired
- Click the “Queues” dropdown menu, select the desired queue (Note: only used for a predictive campaign).
- Click the “Scripter” dropdown menu, select the desired scripter. (Used as agent’s script when performing the campaign).
- Click the “Dialplan” dropdown box, select the desired dialplan.
- Click the “Contact Rate” input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.

8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.
11. Click the “Maximum Daily Attempts” input box, type the daily redial limit.
12. Click the “Maximum Schedule Days” input box, type the maximum schedule days.
13. Click the “Start Date” input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



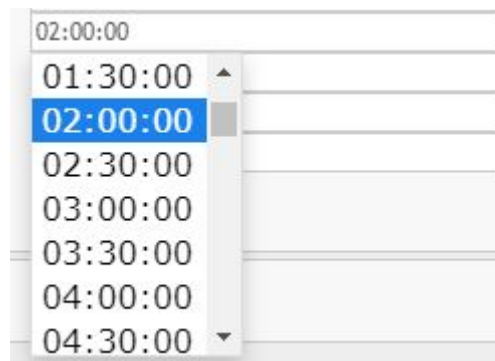
14. Click the “Finish Date” input box, which indicates the end date of the campaign.

Click on the rectangular bar beside the finish date column, and a calendar will popup.

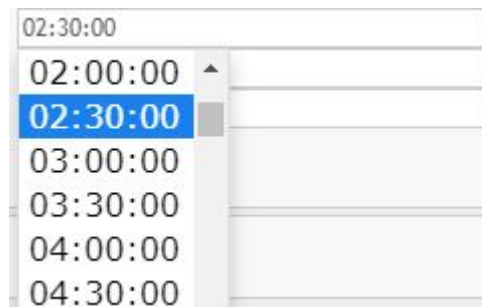
Choose the preferred dates on the calendar, as shown below:



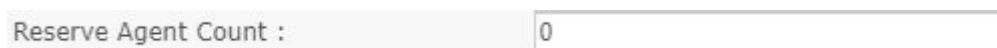
15. Click the “Start Time” input box, which signifies the predetermined time for the campaign to start. The time is set, as shown below:



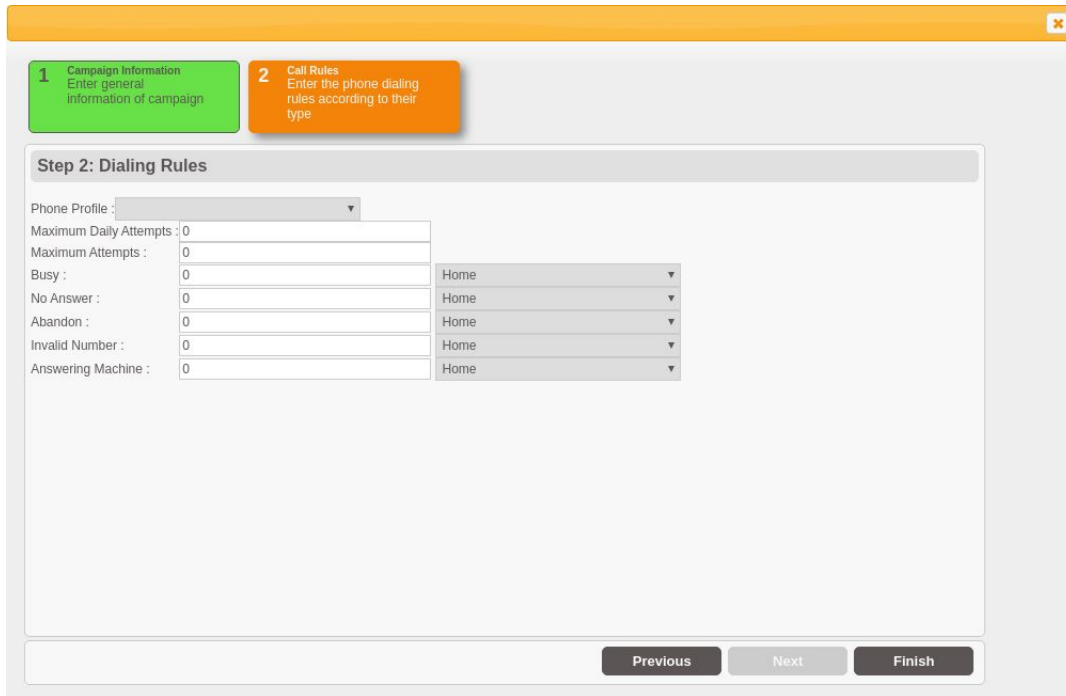
-
16. Click the “Finish Time” input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:

A screenshot of a time selection dropdown menu. The menu is open, showing a list of time options in HH:MM:SS format. The options are: 02:30:00 (highlighted in blue), 02:00:00, 03:00:00, 03:30:00, 04:00:00, and 04:30:00. The dropdown is positioned over a text input field that currently displays "02:30:00".

17. Click the “Ringing Timeout” input box, type the desired timeout (ringing timeout is in seconds and can be adjusted).
18. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign).

A screenshot of the "Reserve Agent Count" input field. The label "Reserve Agent Count :" is followed by a text input box containing the number "0".

19. Click the Next button, . The following screen will be displayed:



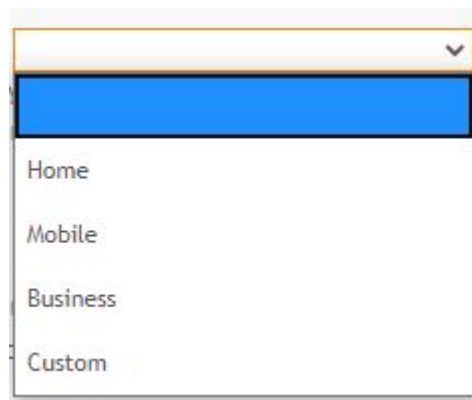
Step 2: Dialing Rules

Phone Profile : ▼

Maximum Daily Attempts :	0	
Maximum Attempts :	0	
Busy :	0	Home ▼
No Answer :	0	Home ▼
Abandon :	0	Home ▼
Invalid Number :	0	Home ▼
Answering Machine :	0	Home ▼

Previous Next Finish

20. Click the “Profile Name” input box, which indicates the profile name of the campaign. It is selected by clicking on the blank space beside the profile name bar shown below (Note: At least one profile type needs to be filled out completely to finish creating the campaign):



▼

- Home
- Mobile
- Business
- Custom

21. Click the “Maximum Daily Attempts” input box, representing the number of redial attempts in a day.
22. Click the “Maximum Attempts” input box, representing the overall number of redial attempts of the campaign.

The following delays are based in seconds (steps 4-8). For example, if a busy tone is reached, and if “4” was inputted in the busy tone input box. Then, there will be a 4-second delay before the next call is made.

Click the “Busy” input box, which is set, as shown below:

Busy :	<input type="text" value="4"/>
--------	--------------------------------

Click the “No Answer” input box which is set as shown below:

No Answer :	<input type="text" value="5"/>
-------------	--------------------------------

Click the “Abandon” input box, which is set, as shown below:


Abandon :	<input type="text" value="4"/>
-----------	--------------------------------

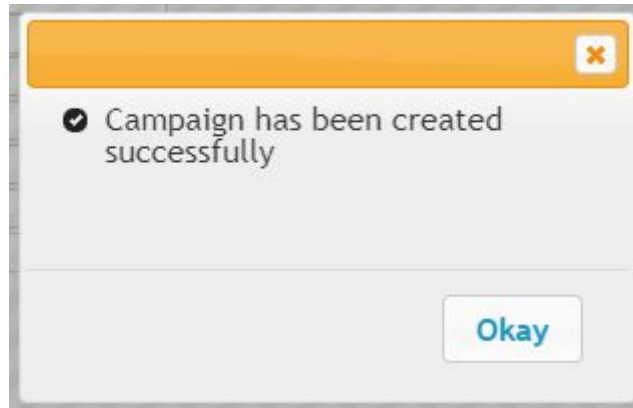
Click the “Invalid Number” input box which is set as shown below:

Invalid Number :	<input type="text" value="5"/>
------------------	--------------------------------


Click the “Answering Machine” input box, which is set, as shown below:

Answering Machine :	<input type="text" value="6"/>
---------------------	--------------------------------

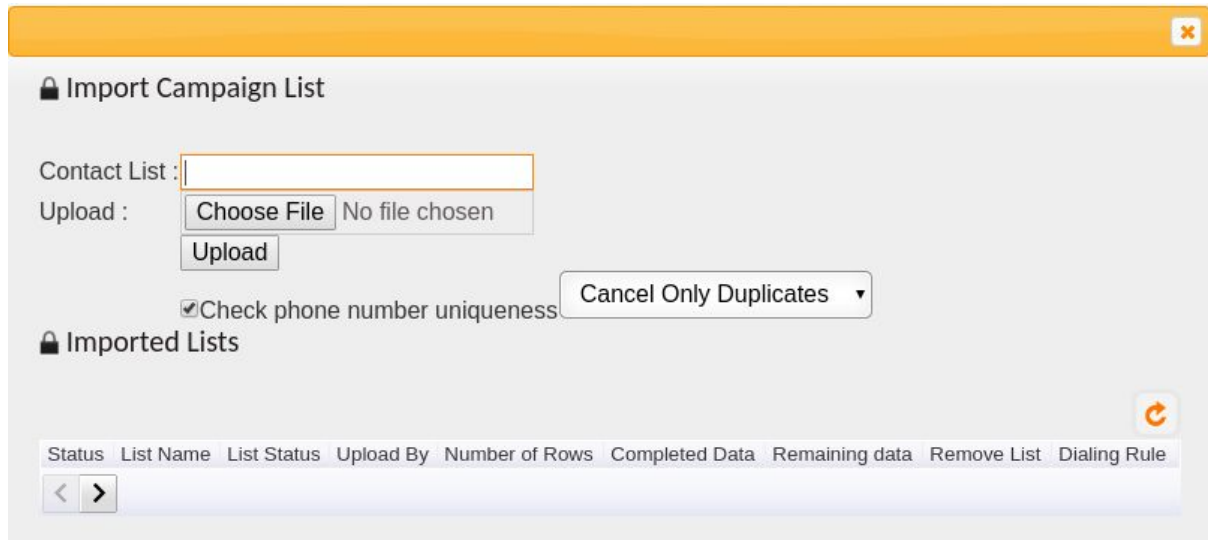
23. To finish setting up the campaign, click on the finish button, . The following pop-up will appear:



Uploading Campaign Contact List

1. Click on the upload button,  located to the right of the desired campaign name.

The following pop-up window will appear:



Import Campaign List

Contact List :

Upload : No file chosen

☒ Check phone number uniqueness

Imported Lists

Status	List Name	List Status	Upload By	Number of Rows	Completed Data	Remaining data	Remove List	Dialing Rule
<	>							

2. Click the “Contact List” input box, type the desired contact list name.
3. Data to be uploaded should be in .CSV format. Create a file using the instructions below:

A. Write your contact list in an excel sheet, as shown below.

Home

Insert

Draw

Page Layout

Formulas

Data

Review

View

Paste

Calibri (Body)

12

A[°]

A[°]

B

I

U

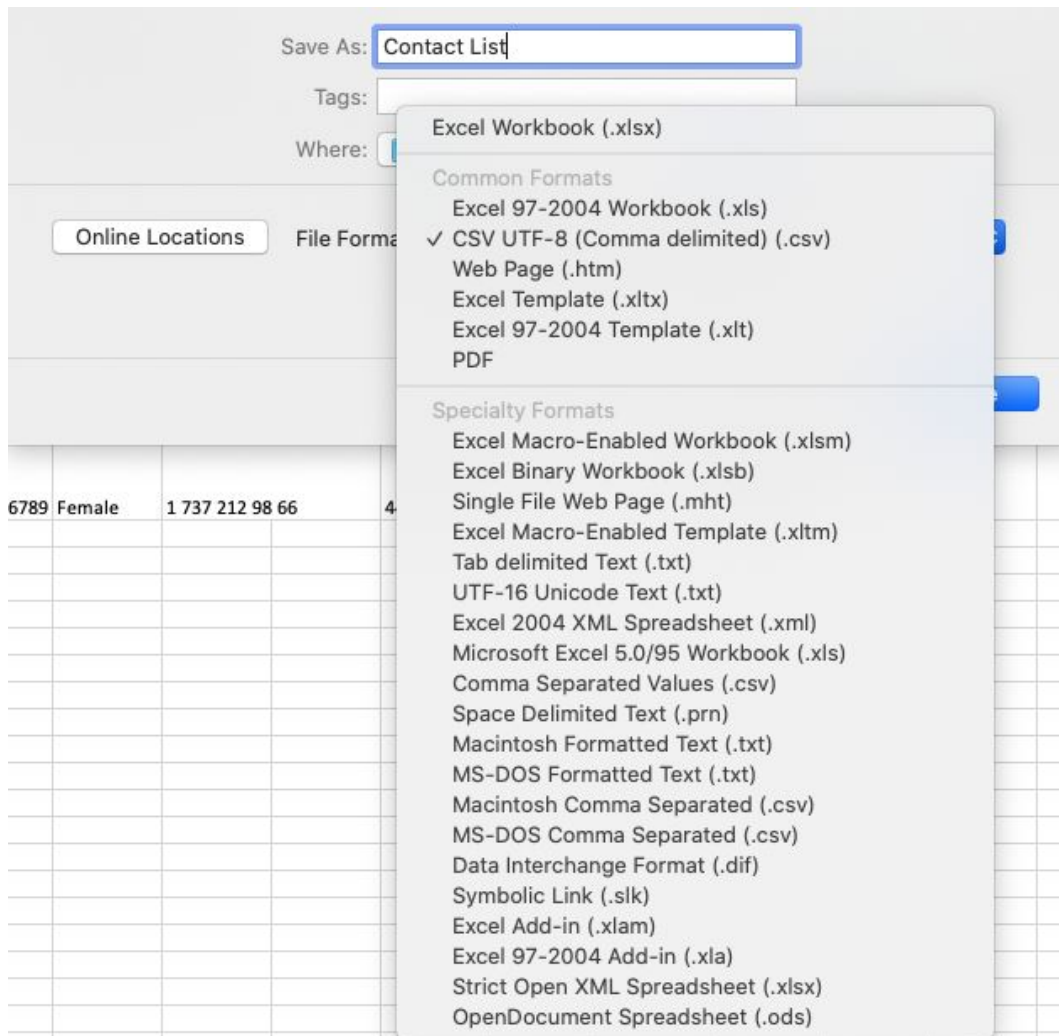
General

H19

f_x

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Name	Company	Email	Birthdate	National ID	Customer ID	Gender	Mobile	Home Phone	Work Phone	Other Phone	Home Address	Work Address	Custom				
2	John Smith	Call Center	S.john.smith@	7.05.1985	123456789	123456789	Male	1 737 212 98 66		44 129 550 0000			12109 Lake Stone Dr Austin, TX 78738					
3	Anna Terry	Call Center	S.anna.terry@	20.03.1990	123456789	123456789	Female	1 737 212 98 66		44 129 550 0000			12109 Lake Stone Dr Austin, TX 78738					
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		

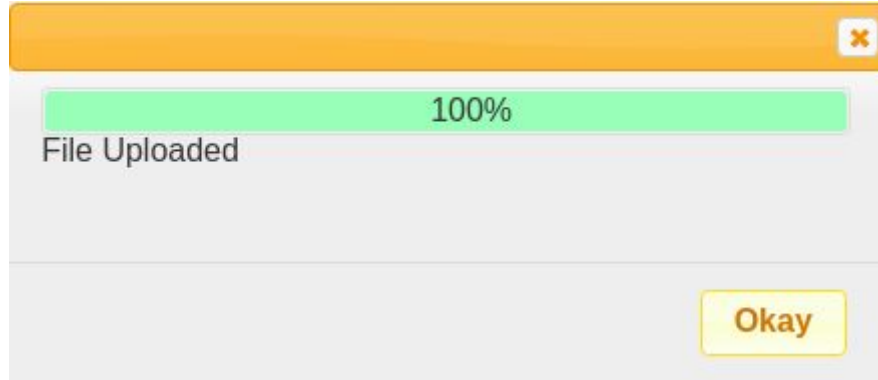
B. Go to “File> Save as” and save it in a .CSV UTF-8 Format, as shown below.



4. Click the “Choose file” button, **Choose File**, and select the saved file as described above in a .CSV UTF-8 format.

Note: It is possible to track the data and observe whether it has been completed or not. Furthermore, another list can be loaded to the same campaign. It must be kept in mind that there should not be duplicate telephone numbers in the second list. If so, this case will come back as overlapping. To avoid this, check the “Check phone number uniqueness” and select “Cancel Only Duplicates.”

5. Click the upload button. The following pop-up window will appear:

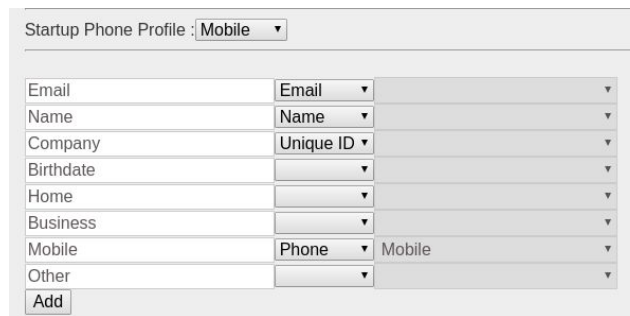


6. Click the Okay button. The following selection will appear in the pop-up window:

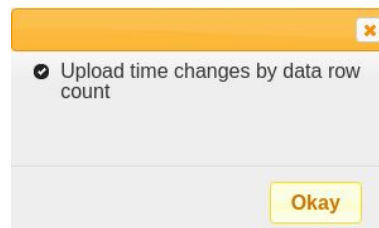
Startup Phone Profile : <input type="text"/>		
Email	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>
Company	<input type="text"/>	<input type="text"/>
Birthdate	<input type="text"/>	<input type="text"/>
Home	<input type="text"/>	<input type="text"/>
Business	<input type="text"/>	<input type="text"/>
Mobile	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>		

7. Click the “Startup Phone Profile,” select the desired start-up phone profile for the campaign (Which phone profile will be called first).

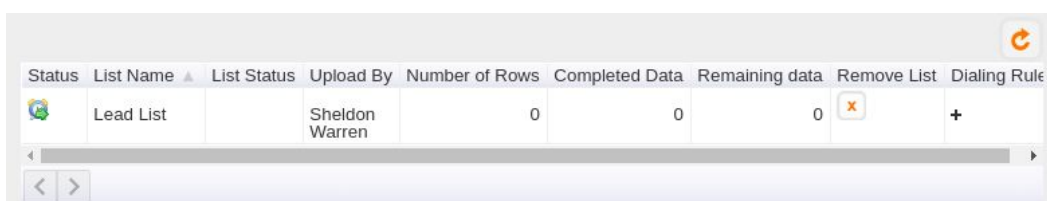
8. Match the uploaded date on the left side of the screen with the dropdown list selections (Note: See the “Adding Custom Field Name” section for creating more dropdown selections):






9. Click the Add button, **Add**, the following pop-up window will appear:



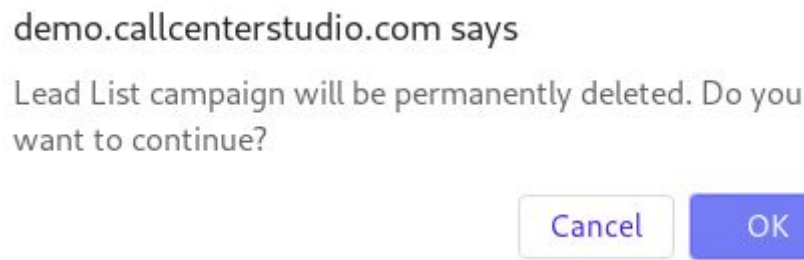
10. Click the Okay button, **Okay**, the newly uploaded list will be displayed as shown below:



Status	List Name	List Status	Upload By	Number of Rows	Completed Data	Remaining data	Remove List	Dialing Rule
	Lead List		Sheldon Warren	0	0	0		+

Note: To delete a list, click the delete button, , to the right of the desired lead list located in the Remove List column.


1. When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.


2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted list will not be shown.

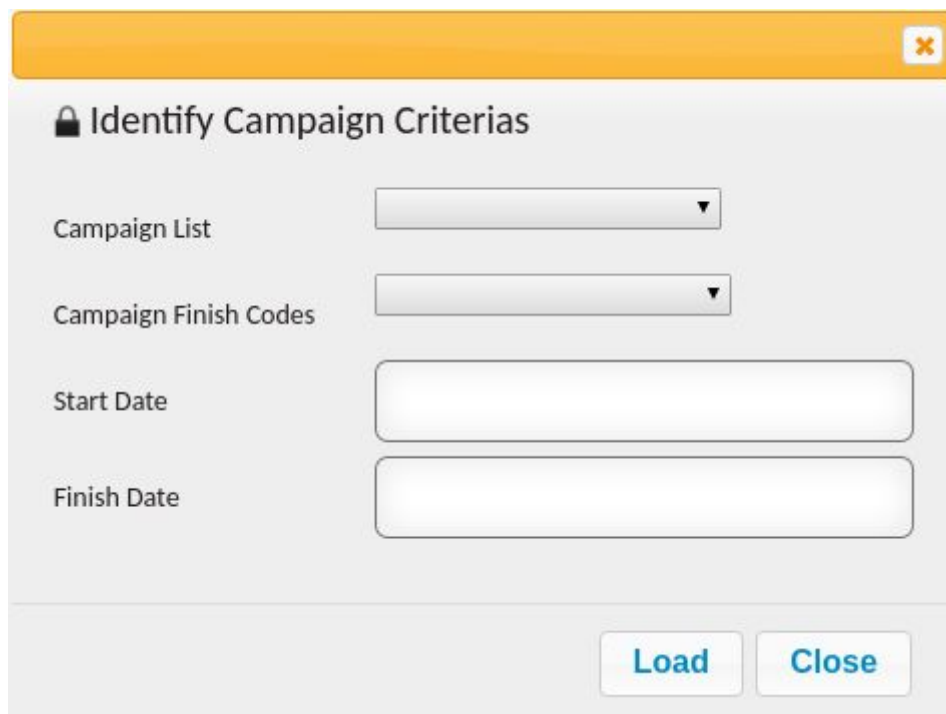
Additional Note: Each lead list within a campaign can have separate dialing rules. If desired, click the Plus button, , located to the right of the desired lead list in the Dialing Rule column. (See the Dialing Rules Tab section, to set dialing rules).

Recycling a Campaign Contact List

After a campaign is finished, the campaign list can be reused according to the finish code assigned to each contact. This feature is used to avoid re-adding lists into the campaign.


1. Click on the recycle button,  located to the right of the desired campaign name.

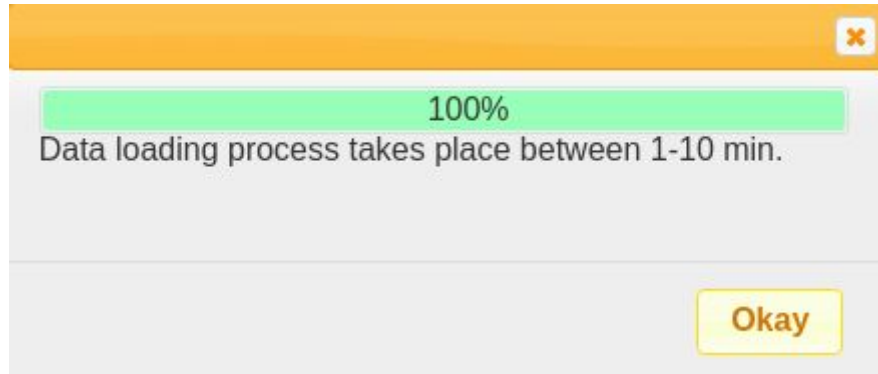
The following pop-up window will appear:




The pop-up window has a yellow header bar with a close button (X). The title is "Identify Campaign Criterias" with a lock icon. It contains four input fields: "Campaign List" and "Campaign Finish Codes" are dropdown menus, while "Start Date" and "Finish Date" are text input boxes. At the bottom right are "Load" and "Close" buttons.


2. Click the "Campaign List" dropdown menu, choose the desired contact list in the campaign.
3. Click the "Campaign Finish Codes" dropdown menu, choose the desired finish code to reuse.
4. Click the "Start Date" input box, choose the desired start date to filter the finish code.
5. Click the "Finish Date" input box, choose the desired finish date to filter the finish code.

6. Click the Load button, . The following pop-up window will appear:




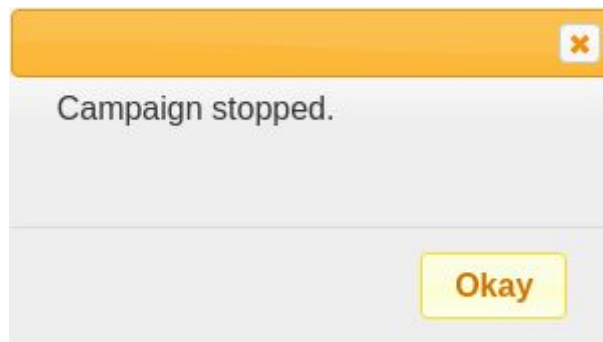
7. Click the Okay button, . The new list will appear under the campaign uploaded lists section.


Starting a Campaign

1. Click the start button,  located to the right of the desired campaign name (Start / Stop Campaign Column).

Stopping a Campaign


1. When the campaign is running, click the stop button, . The following pop-up window will appear:



2. Click the Okay button, .

Editing a Campaign



Click the edit button, , located to the far right of the campaign name the following screen will appear:

Campaign Options
Dialing Rules
Finish Codes
Contact Notifications

Announce

Edit Campaign

Campaign ID :
ahRzfm11c3RlcmktaGl6bWV0bC

Campaign Name :
test

Campaign Type :
Predictive

IVR Menu :

Queue :
inbound

Scripter

Dialplan

Maximum Effort :
2

Maximum Call :
2

Default Speed :
3
Max : 10

Auto Speed :

Ignore auto speed for fresh records :

Daily Number Dialing Limit :
0

Reservation Duration :
0

Check For Blacklist :

Route Strategy :

Start Date :
2020-01-29

Finish Date :
2022-01-31

Start Time :
09:30:00

Finish Time :
18:00:00

Ringing Timeout :
21

Reserve Agent Count :
0

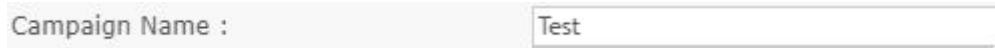
Days of week :
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Weekly Custom Time :

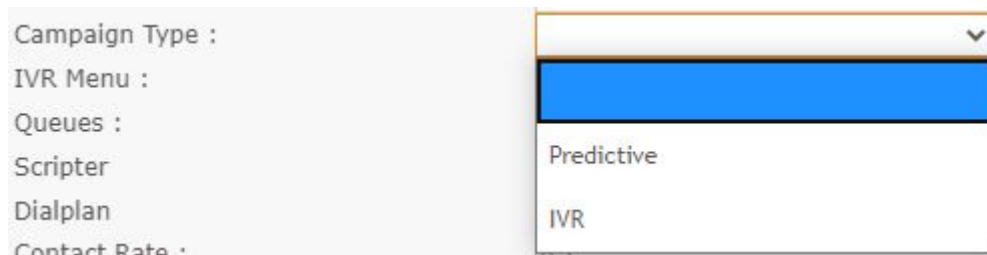
Save

Campaign Options Tab

1. Click the “Campaign Name” input box, type the desired campaign name. An example is shown below:



2. Click the “Campaign Type” dropdown box the following selections will appear:



Predictive	A campaign that uses the scripter and agents answer outbound calls performed dialer assigned to the campaign. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

3. Select “Predictive” or “IVR” whichever is desired.
4. Click the “Queues” dropdown menu, select the desired queue (Note: only used for the predictive campaign).

-
5. Click the “Scripter” dropdown menu, select the desired scripter. (Used as agent’s script when performing the campaign).
 6. Click the “Dialplan” dropdown box, select the desired dialplan.
 7. Click the “Contact Rate” input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.
 8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
 9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
 10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.

Or

The “auto speed” checkbox can be selected, which is based on the amount of previously available agents.

The "Ignore auto speed for fresh records” checkbox can be selected, which ignores the auto speed for newly added contacts.

11. Click the “Daily Number Dialing Limit” input box, type the daily number dialing limit.
12. Click the “Reservation Duration” input box, type the reservation duration (seconds).
13. Check the “Check for Blacklist” checkbox if desired (checks the numbers to see if it is blacklisted before making the call).

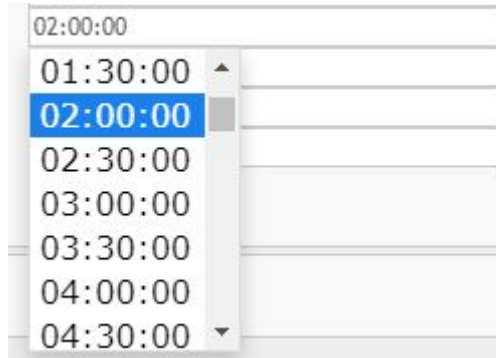
14. Click the “Maximum schedule days” input box, which signifies the campaign’s intended number of days. Type the desired number of days.
15. Click the “Start Date” input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



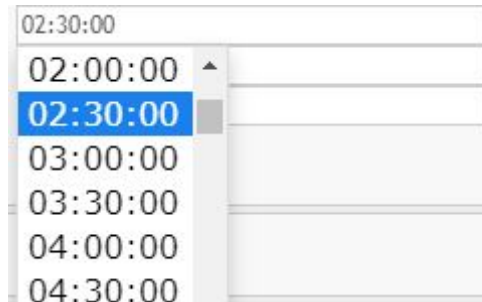
16. Click the “Finish Date” input box, which indicates the end date of the campaign.
- Click on the rectangular bar beside the finish date column, and a calendar will popup.
- Choose the preferred dates on the calendar, as shown below:



17. Click the “Start Time” input box, which signifies the campaign’s preferred time to start. The time is set, as shown below:

A screenshot of a dropdown menu for the 'Start Time' input box. The menu is open, showing a list of time options in HH:MM:SS format. The current selected time is 02:00:00, which is highlighted in blue. The visible options are 01:30:00, 02:00:00, 02:30:00, 03:00:00, 03:30:00, 04:00:00, and 04:30:00. The dropdown is positioned over a light gray input box.

18. Click the “Finish Time” input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:

A screenshot of a dropdown menu for the 'Finish Time' input box. The menu is open, showing a list of time options in HH:MM:SS format. The current selected time is 02:30:00, which is highlighted in blue. The visible options are 02:00:00, 02:30:00, 03:00:00, 03:30:00, 04:00:00, and 04:30:00. The dropdown is positioned over a light gray input box.

19. Click the “Ringing Timeout” input box which is set as shown below (ringing timeout is in seconds and can be adjusted):

20. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign).

Reserve Agent Count :	0
-----------------------	---

21. Under agent count the days of the week are shown, check the desired days for the campaign to run, or check “Custom Time” and the following selections will appear:

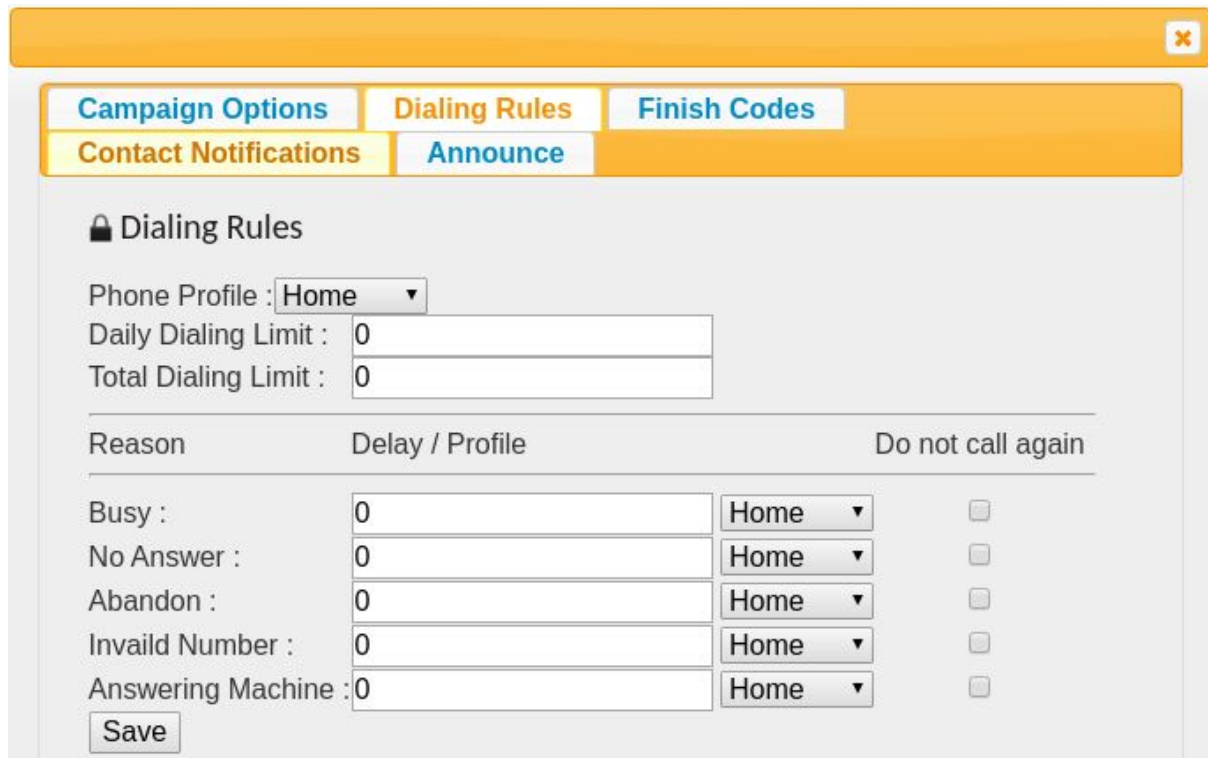
<input type="checkbox"/> Monday		
<input type="checkbox"/> Tuesday		
<input type="checkbox"/> Wednesday		
<input type="checkbox"/> Thursday		
<input type="checkbox"/> Friday		
<input type="checkbox"/> Saturday		
<input type="checkbox"/> Sunday		

22. Complete the custom time chart if desired. (Note: the custom time plan is not affected by previous dates and times inputted above).
23. Click the save button, **Save**.

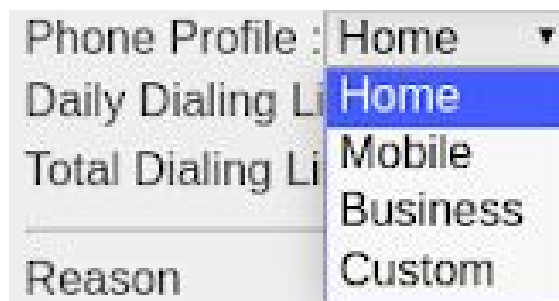
Dialing Rules Tab

Dialing rules are created to set specific dialing rules based on the number profile.

Click the Dialing Rules tab, **Dialing Rules**. The following screen will appear:




1. Select the desired Phone Profile as shown below (Note: this can be done for each phone profile):



2. In the “Daily Dialing limit,” input box type the desired daily redialing limit for each contact.

-
3. Click the “Total Dialing limit” input box. Type the desired campaign total redialing limit for each contact.

The following delays are based in seconds (steps 4-8). For example, if a busy tone is reached, and if “4” is inputted in the busy tone input box. Then, there will be a 4-second delay before the next call is made. (Note: the “Do not call again” checkbox can be selected based on what occurred during the call).

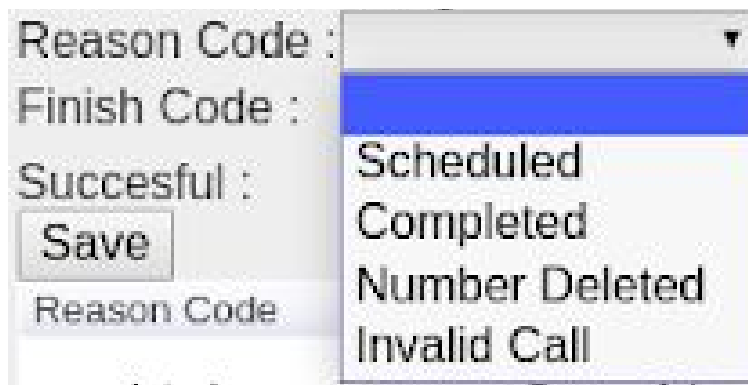
4. Click the “Busy” input box, type the delay time in seconds until the next call will be dialed.
5. Click the “No Answer” input box, type the delay time in seconds until the next call will be dialed.
6. Click the “Abandon” input box, type the delay time in seconds until the next call will be dialed.
7. Click the “Invalid Number” input box, type the delay time in seconds until the next call will be dialed.
8. Click the “Answering Machine” input box, type the delay time in seconds until the next call will be dialed.
9. Click the save button, .

Finish Codes Tab

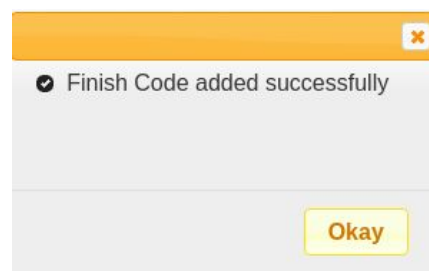
Finish codes can be created to organize the campaign and to organize the contacts based on what occurred during the call.

Click the Finish Codes tab, **Finish Codes**. The following screen will appear:

1. Click the “Reason Code” dropdown box. The following dropdown menu will appear:





2. Select the desired reason code.
3. Click the “Finish Code” input box, type the desired finish code.
4. If the Finish Code is created for a successful contact, select the “Successful” checkbox.
5. Click the save button, **Save**, the following screen will appear:





6. Click the okay button, **Okay**, the newly created Finish Code will be added to the Finish Code list.

Editing a Finish Code

1. Click the edit button, , located to the far right of the finish code name.
2. Make the necessary changes.
3. Click the save button, .

Deleting a Finish Code



1. From the Finish Code name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

Successful finish code will be permanently deleted. Do you want to continue?

Cancel

OK


- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted finish code will not be shown.


Contact Notifications Tab

Contacts notifications can be added to a CRM via a webhook using this tab.


1. If desired, check the “Contact Webhook Enabled” checkbox.
2. Click the “Contact Webhook URL” and input the URL.
3. If desired, check the “Call Result Webhook Enabled” checkbox.
4. Click the “Call Result Webhook URL,” and input the URL.
5. After the desired additions have been made, click the save button, .

Announce Tab

Announcements used during the campaign can be added here.

1. Click the “Announcement” dropdown box, select the desired announcement (Note: additional announcements can be added in the announcements section).
2. Click the “Announcement Repeat Period (Second)” type the desired time duration in seconds.
3. If desired, the “Instantly Play Once When Call Answered” checkbox can be checked to play the announcement once the call is answered.
4. After the desired additions have been made, click the save button, .

Deleting a Campaign

1. From the Campaign list, click the delete button, , to the right of the edit button,



. When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

Chat will be deleted Do you want to continue?

Cancel

OK

- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted campaign will not be shown.



Adding Custom Field Name

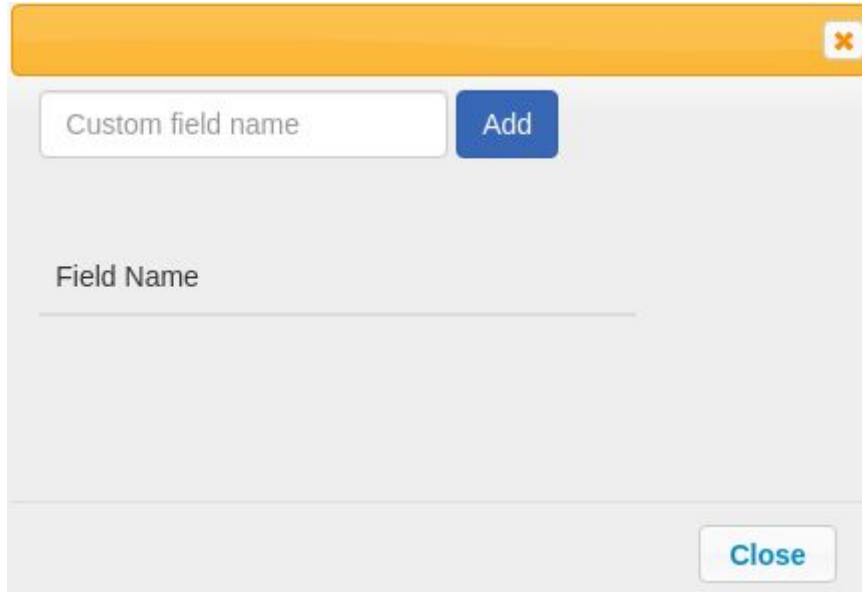
When uploading a contact list for a campaign, Unique ID, Email, Name, and Phone are the default input field for the selection as shown below:

Email	▼
Name	
Company	Unique ID
Birthdate	Email
Home	Name
	Phone


If desired, additional fields can be created to match additional information uploaded in the Call Center Studio system. For Example, Company is an uploaded field from the created .CSV file. Once, a custom field is created the dropdown selection will also have Company listed so that they can be matched as shown below:

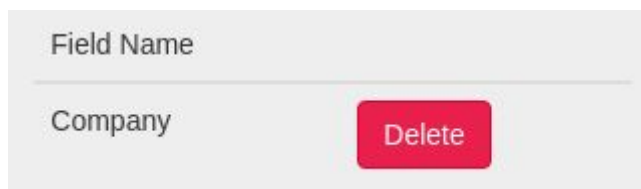
Email	▼
Name	
Company	Unique ID
Birthdate	Email
Home	Name
	Phone
Business	Company

1. From the Campaign list, click the custom field button, , to the right of the delete button, . When the delete button is clicked the following pop-up will appear:





A pop-up window with an orange header bar containing a close button (X). The main area has a text input field labeled "Custom field name" with a blue "Add" button to its right. Below this is a larger text input field labeled "Field Name". At the bottom right is a "Close" button.

2. Click the "Custom field name" input box, type the desired custom field name.
3. Click the Add button, . A created example is shown below:




A list item for a custom field. It has a text input field labeled "Field Name" containing the text "Company". To the right of the input field is a red "Delete" button.

Note: To delete the custom field name, click the "Delete" button, , located to the right of the desired custom field name.


4. After adding custom fields, click the Close button, , to return to the campaign name list.

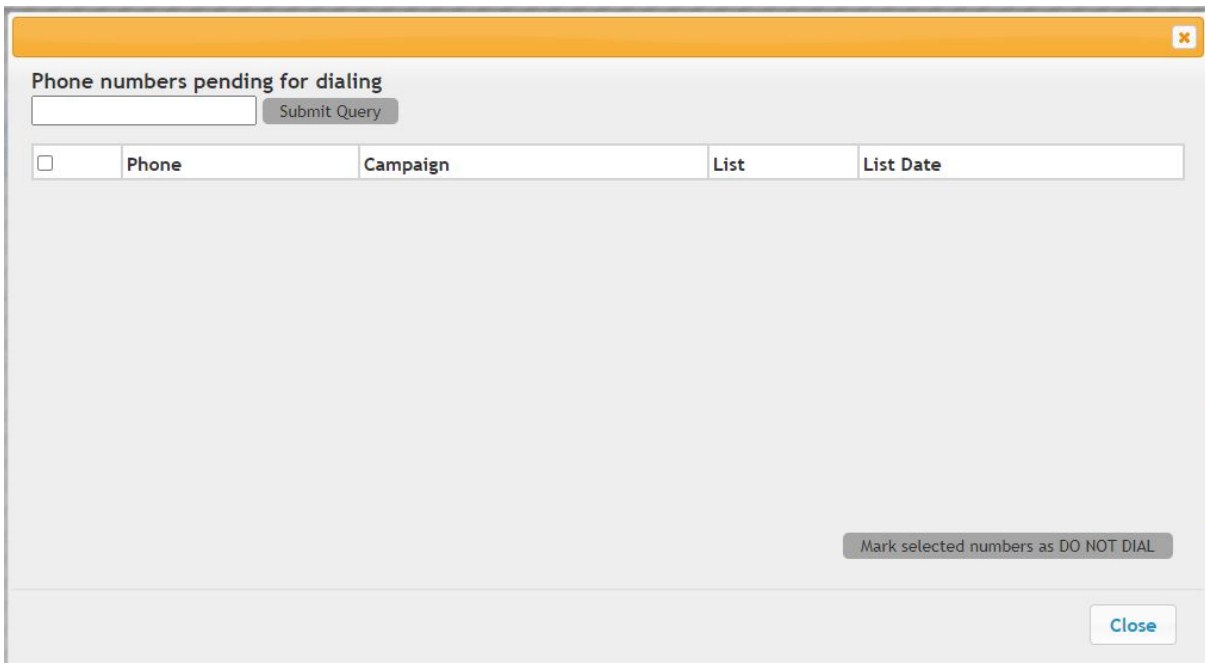
Refreshing Campaign Section

1. To refresh the campaign section, click on the refresh button  located on the top right corner of the screen.

Data Management by Phone Number

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon  located in the top right corner of the screen. The image below will appear:



The screenshot shows a window titled "Phone numbers pending for dialing" with a close button in the top right corner. Inside the window, there is a search bar and a "Submit Query" button. Below this is a table with the following columns: a checkbox, "Phone", "Campaign", "List", and "List Date". The table body is currently empty. At the bottom right of the window, there is a button labeled "Mark selected numbers as DO NOT DIAL" and a "Close" button.

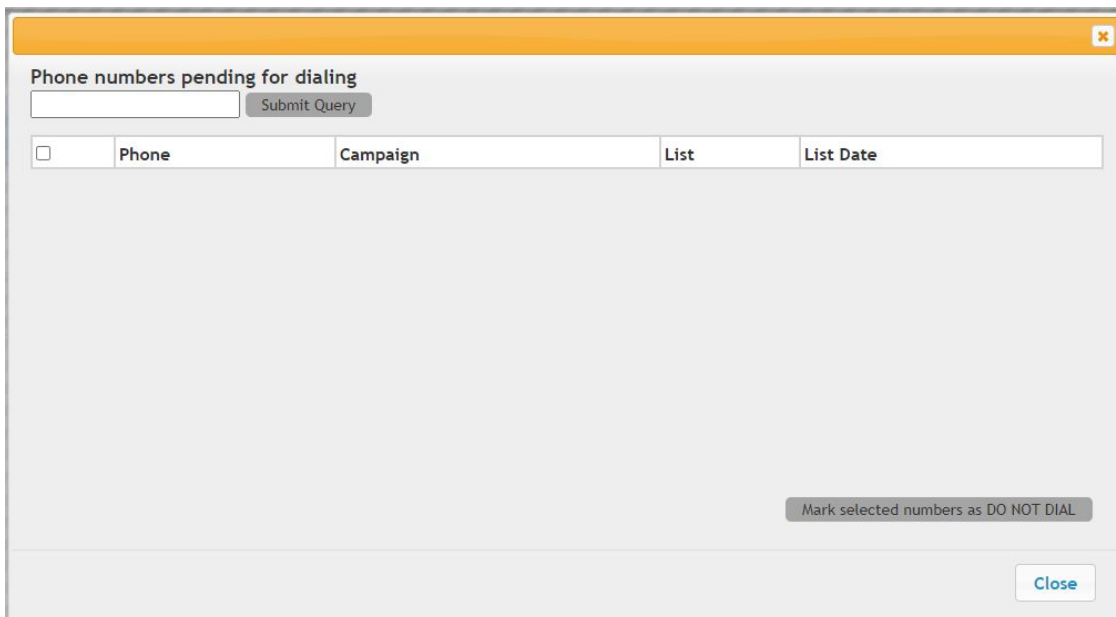
2. Submit a query by inputting the phone number in the submit query bar.
3. Click on the submit query button.

4. Click on the close button, , to finish data management.


Data Management by Unique ID

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon , located on the top right corner of the screen. The image below will appear:



The screenshot shows a window titled "Phone numbers pending for dialing" with a close button in the top right corner. Inside the window, there is a search bar with a "Submit Query" button. Below this is a table with the following headers: ☐, Phone, Campaign, List, and List Date. The table body is empty. At the bottom right of the window, there is a button labeled "Mark selected numbers as DO NOT DIAL" and a "Close" button.

2. Submit a query by inputting the unique ID (can be found in the reporting section after downloading the desired campaign .CSV file, a column will be labeled unique ID, each call is assigned a unique ID) in the submit query bar.
3. Click on the submit query button.
4. Click on the close button , below to finish data management.

Searching for a Campaign

1. Click the “Campaign” input box, type the campaign’s name the input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of this box, the word "Campaign" is written in a dark gray font. To the right of the text, there is a white rectangular input field with a thin gray border.


Note: Partial names can be used, when spelled correctly.

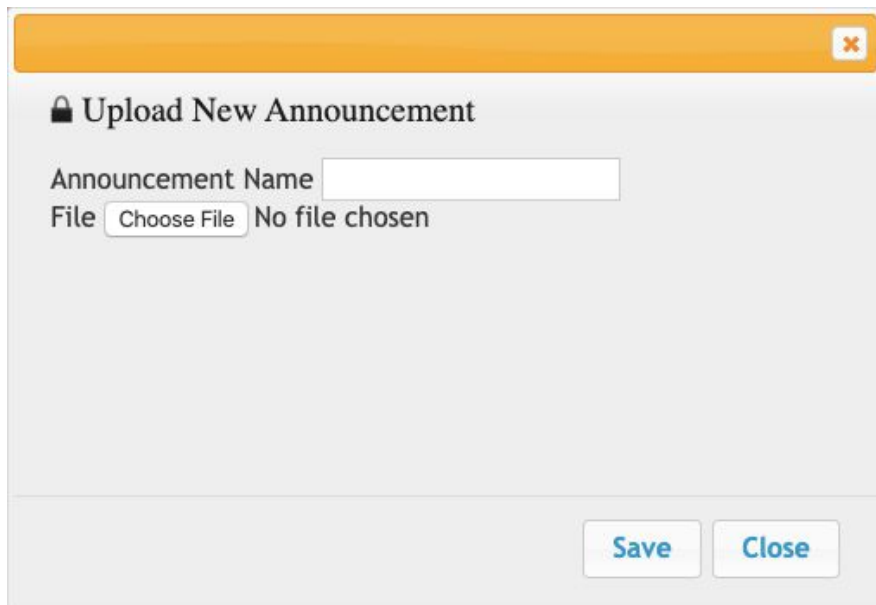
Announcements



It is the menu where the announcements used in the IVR are loaded and edited.

Adding an Announcement

1. To add the announcement, press the add button, , if done correctly, the following pop-up window will be displayed:



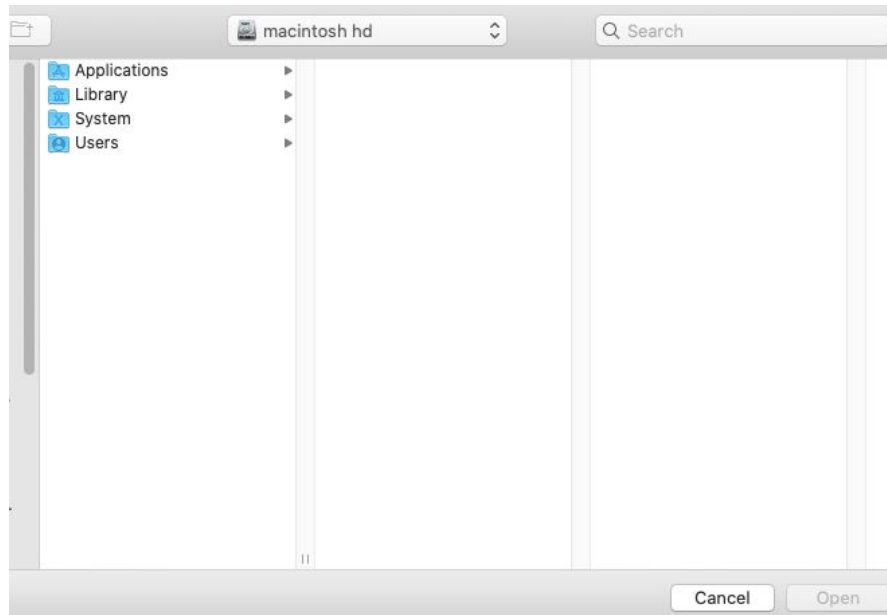
The pop-up window has a title bar with a close button (X). The main content area is titled "Upload New Announcement" with a lock icon. It contains two input fields: "Announcement Name" and "File". The "File" field has a "Choose File" button and the text "No file chosen". At the bottom right, there are "Save" and "Close" buttons.

2. Write the preferred announcement name in the input box next to the “Announcement Name” an example is shown below:



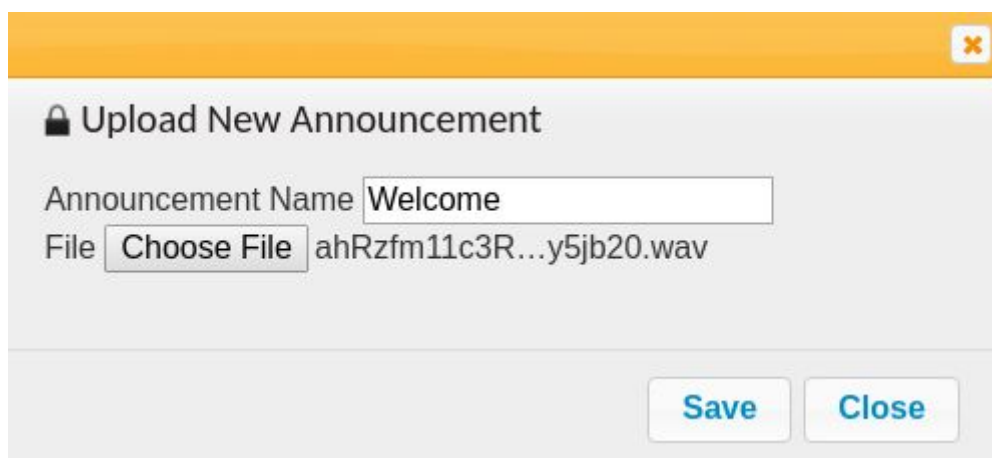
The input field is labeled "Announcement Name" and contains the text "Welcome".

3. To choose the sound file, press the “choose file” button, **Choose File**, then double click the related sound file from the file explorer. As shown below:

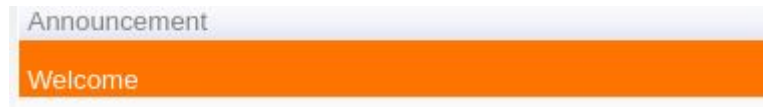


Note: Sound files loaded to the system must be in 8000Hz bandwidth, single-channel (mono), 16bit, and in .wav file extension.

After selecting the sound file, the pop-up window will show the uploaded sound file as depicted below:




-
4. Once the sound file is selected, press the “Save” button. If done correctly, the announcement will be displayed under the “Announcement” list as shown below:



Sound files in the system can be downloaded for listening. They can also be deleted and edited.

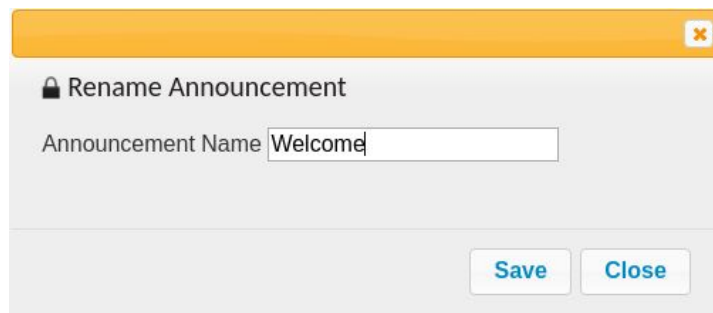
Editing an Announcement


Note: Only the name of the announcement can be edited here.

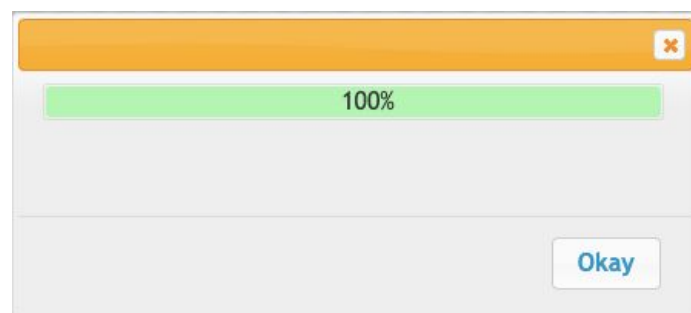
1. To edit an announcement, click the edit button, , located on the far right of the “Announcement Name” as shown, below:



2. After clicking the edit button, the announcement pop-up window will appear as shown. Changing the Announcement Name can be made using this pop-up window.





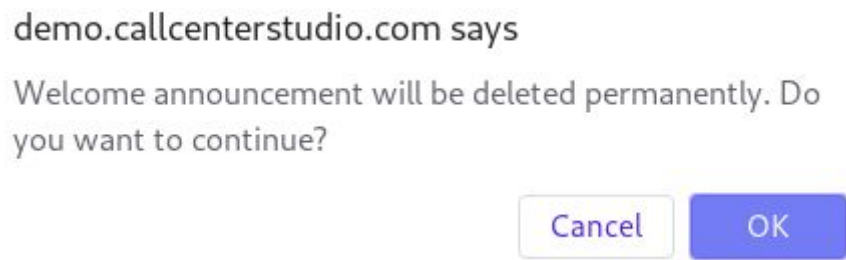
3. Make changes as desired.
4. Once the desired changes have been completed, the information can be saved by clicking the save button, , the following pop-up box will appear:


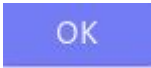



5. Click the Okay button, , to confirm the changes.

Deleting an Announcement

1. From the Announcement list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .


The screen will reload, and the deleted team will not be shown.

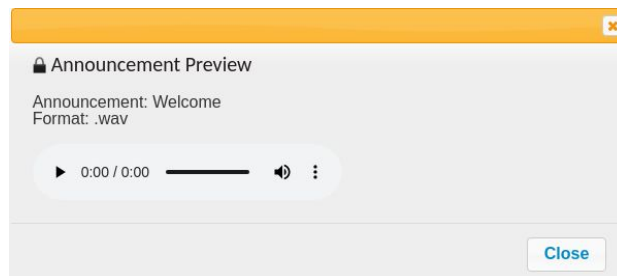
Downloading an Announcement


1. To download the announcement, click the download button



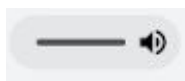
Listening to an Announcement



1. To listen to the announcement, click the “Listen” button  the following pop-up window will be displayed:

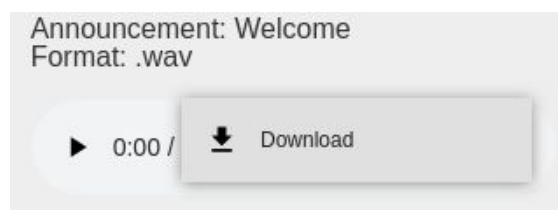


2. To listen to the announcement, click the play button, .

Note: volume can be adjusted using the bar shown below:



The announcement can be downloaded by clicking the three vertical dots, , to the right of the volume button, . And then click the “Download” button as shown below:



Searching for an Announcement

The input box to the right of Announcement can be used to find announcements quickly:

A light gray rectangular box containing the word "Announcement" in a gray font on the left and a white rectangular input field on the right.

To refresh the page, click the refresh button,



Statuses



Statuses are defined for users registered in the system having agent roles. Multiple settings for agent statuses can be changed, created, and edited here.

Example:

Suppose break time determined is 20 minutes, and the agent stays in the break time status longer than 20 minutes. In that case, the agent's row will be highlighted in the supervisor screen, indicating to the supervisor that an agent is past the allotted time. Also, a warning phrase, "you are in the same status for a long time, please change your status" is displayed on the agent's screen.

Default Statuses:

The following table shows all the Default Statuses:


Default Statuses

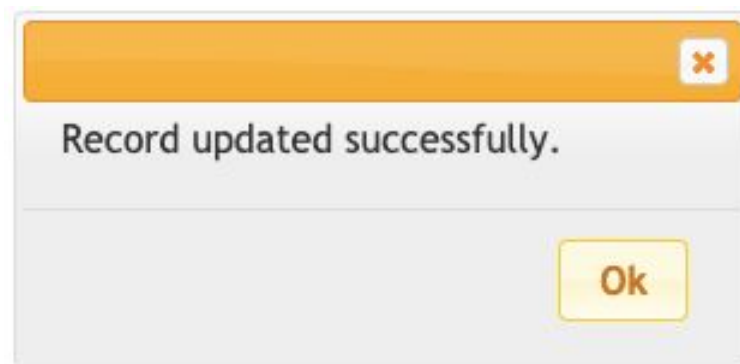
Alarm (min) / Pop up (sec) / Limit (ct) ⓘ

Talking	0	0	-
Dialing	2	0	-
Available	1	0	-
shortbreak	1	2	0
Lunch	1	1	0
Meeting	1	1	0
Training	1	8	0
ACW	1	20	0
Ringing	2	0	-
Wrapup	1	0	-
Chat	1	0	-
Outbound	1	5	-
Back Office	2	0	0
Hold Message	1	0	-
Not Answering	2	0	-

Save

1. The first column shows the **statuses**. For further information about the statuses, check the Agent Section of this Manual.

2. The second column shows the **alarm minutes**. Once the agent waits in the related statuses more than the preferred limit, an alarm pops up on the supervisor's screen.
3. The third column shows the **pop-up seconds**. Once the agent waits in the related statuses more than the preferred limit, an alarm pops up in the agent's screen for the length of time inputted into this column.
4. The fourth column shows **preferred limits** for each Statuses Limits (ct). 0 (zero) will disable a limit check for specified status. Negative values will disable the specified status entirely. If a positive number is inputted, for example, "1", only one agent can be in this status.
5. Write the numbers to the input boxes in the second, third and fourth columns, then click the save button, Once the desired changes have been completed, the information can be saved by clicking the save button,  , the following pop-up box will appear:



6. Click the Okay button,  , to confirm the changes.

Pending Call Alarm



The form has an orange header bar with the text "Pending Call Alarm". Below the header, there are two input fields: "Call Count" with the value "1" and "Call Duration" with the value "10". To the right of these fields is an orange "Save" button.

Note: Furthermore, Pending Call definition can be performed to trace calls waiting in the supervisor screen and enable warnings to be taken as well.

1. Click the “Call Count” input box, type the preferred call count in the layout shown below:




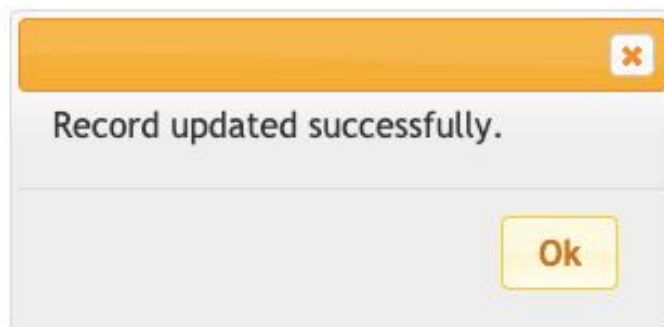
The image shows the "Call Count" label followed by an input box containing the number "1".

2. Click the “Call Duration” input box, type the preferred Call Duration (in seconds) in the layout shown below:




The image shows the "Call Duration" label followed by an input box containing the number "10".

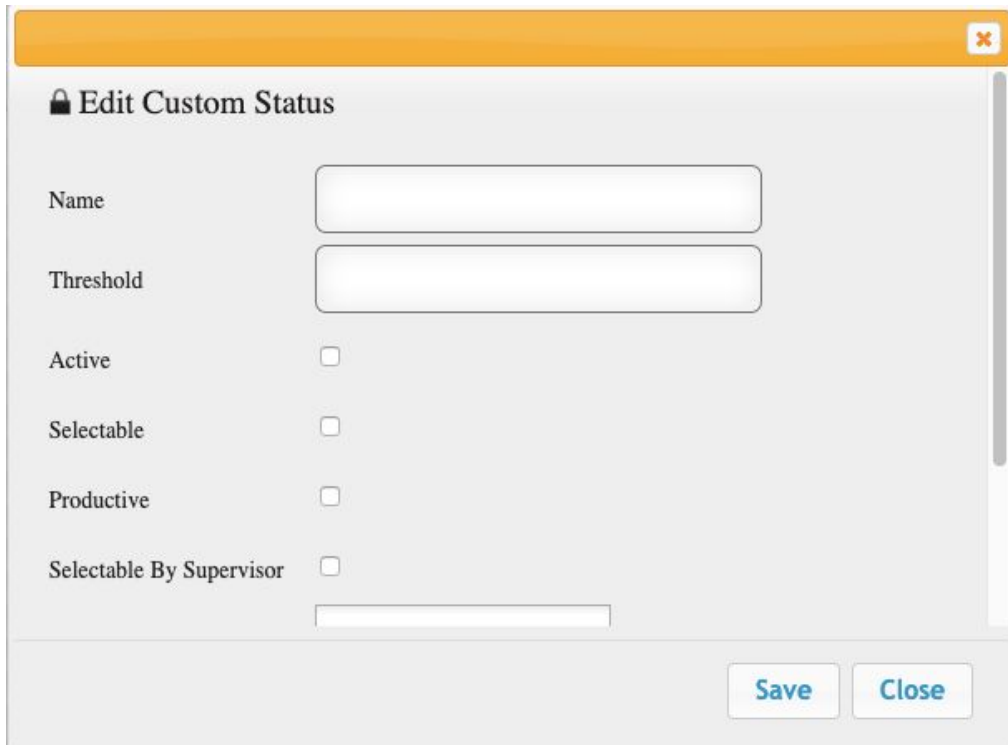
3. Once the desired changes have been completed, the information can be saved by clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes.

Creating a Custom Status

1. To add the custom announcement, press the add button, , if done correctly, the following pop-up window will be displayed:



The image shows a pop-up window titled "Edit Custom Status" with a close button in the top right corner. The window contains the following fields and options:

- Name:** A text input field.
- Threshold:** A text input field.
- Active:** A checkbox.
- Selectable:** A checkbox.
- Productive:** A checkbox.
- Selectable By Supervisor:** A checkbox.
- Below the "Selectable By Supervisor" checkbox is an empty text input field.
- At the bottom right are two buttons: "Save" and "Close".

2. Click the "Name" input box. Type the desired name for the status.
3. Click the "Threshold" input box, type the desired threshold value.

4. The following checkboxes are explained below, and can be selected as desired:

Active	Makes the status “Active.”
Selectable	Makes the status “Selectable.”
Productive	When this checkbox is checked for the status, when the agent selects the status, the status time will be added into the Production calculation in the Reporting section under the Agent Performance Report.
Selectable By Supervisor	Makes the status selectable to the supervisor.

5. In the “Team” input box, a team can be assigned to the custom status for use, if desired.


6. In the “Limit” input box, a status limit can be assigned to the status so that only a limited number of agents can select the status in a given time period.


Note: If “0” is selected, there will be no status limit. If a negative number is selected, the status will be disabled entirely.


7. If done correctly, the custom status will be displayed under the “Custom Statuses” list as shown below:

Custom Statuses								
Status	Active	Alert Threshold	Selectable	Productive	Selectable By Supervisor	Limit	Allow Reserve Status	
SupervisorCall	True	0	True	True	True	0	False	 
SalesMeeting	True	0	True	True	True	0	False	 

Editing a Custom Statuses

1. To edit a custom status, click the edit button, , located on the far right of the “Status Name” as shown below:

Custom Statuses									
Status	Active	Alert Threshold	Selectable	Productive	Selectable By Supervisor	Limit	Allow Reserve Status		
refus	True	0	True	False	False	0	False		

After clicking the edit button, , the custom status pop-up window will appear as shown:

✕

🔒 Edit Custom Status

Name

SupervisorCall

Threshold

0

Active

☒

Selectable

☒

Productive

☒

Selectable By Supervisor

☒

Team

Limit

0

Allow Reserve Status


☐

Save



Close

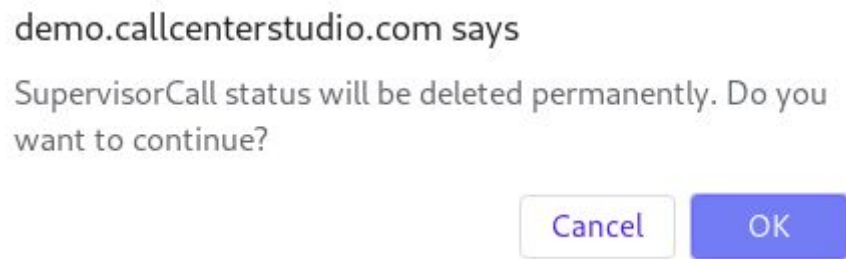
2. Make changes as desired.


-
3. Once the desired changes have been completed, the information can be saved by


clicking the save button,  .

Deleting a Custom Status

1. From the Custom Statuses list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.







2. Confirm the deletion by clicking the “OK” button, .

The screen will reload, and the deleted status will not be shown.

Web URLs




Enables 3rd party applications to be triggered through necessary parameters.

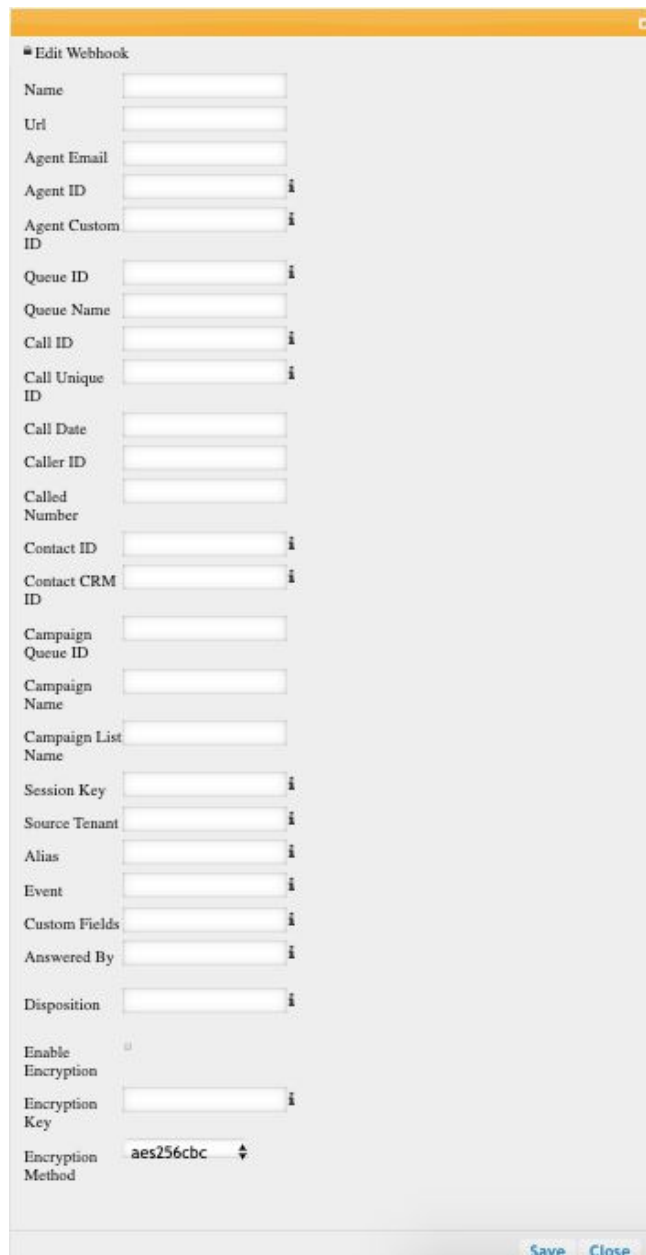
Popup	Call ID	Queue	Agent Email	Caller ID	Contact Key	Campaign ID	
Fatih 21			fatih.koc@callcenterstudio.com				 
Param's Test		202199928					 
05.04.2020							 

While creating Web URLs, the related address is entered in the URL field. The remaining fields include variable definitions to be sent to the related web service according to the company's needs. If assistance is needed, please contact the assigned Call Center Studio Project.

Adding a Webhook

Note: The “Name” & “Url” input boxes are mandatory fields.

1. Click the New button, , located in the top right corner of the popup screen. The following pop-up screen will appear as shown below:



The screenshot shows a web browser window with a title bar that says "Edit Webhook". The main content area contains a list of input fields for configuring a webhook. The fields are: Name, Url, Agent Email, Agent ID, Agent Custom ID, Queue ID, Queue Name, Call ID, Call Unique ID, Call Date, Caller ID, Called Number, Contact ID, Contact CRM ID, Campaign Queue ID, Campaign Name, Campaign List Name, Session Key, Source Tenant, Alias, Event, Custom Fields, Answered By, Disposition, Enable Encryption, Encryption Key, and Encryption Method. The Encryption Method field is currently set to "aes256cbc". At the bottom right of the form, there are two buttons: "Save" and "Close".

2. Click the “Name” input box, type the new webhook’s name as seen below:

Note: The “Name” & “Url” input boxes are mandatory fields.

Name	<input type="text" value="wttxpopup"/>
------	--

3. Click the “Url” input box, type the webhook’s Url in the layout shown below:

Note: The “Name” & “Url” input boxes are mandatory fields.

Url	<input type="text" value="https://my.teknofix.com.tr/lib/callcenter"/>
-----	--


4. Click the “Agent Email” input box, type the agent’s email in the layout shown below:

Agent Email	<input type="text" value="fatih.koc@callcenterstudio.com"/>
-------------	---

5. Click the “Agent ID” input box, type the agent’s unique ID in the system in the layout shown below:

Agent ID	<input type="text" value="83"/>	
----------	---------------------------------	---

6. Click the “Agent Custom ID” input box, type the unique ID value given by the user in the layout shown below:

Agent Custom ID	<input type="text" value="83"/>	
-----------------	---------------------------------	---

-
7. Click the “Queue ID” input box, type the queue ID an example is shown below:

A screenshot of a web form showing a label "Queue ID" on the left. To its right is a text input box containing the number "5". To the right of the input box is a small, dark information icon (an 'i' inside a circle).

8. Click the “Agent ID” input box, type the Queue’s Name in the layout shown below:

A screenshot of a web form showing a label "Queue Name" on the left. To its right is a text input box containing the word "Sales".

9. Click the “Call ID” input box, type the unique value of the call given by the system in the layout shown below:

A screenshot of a web form showing a label "Call ID" on the left. To its right is a text input box containing the word "callkey". To the right of the input box is a small, dark information icon (an 'i' inside a circle).

10. Click the “Call Unique ID” input box, type the call’s unique ID.

11. Click the “Call Date” input box, type the call’s date in the layout shown below:

A screenshot of a web form showing a label "Call Date" on the left. To its right is a text input box containing the date "14.02.2020".

12. Click the “Caller ID” input box, type the caller’s ID in the layout shown below:

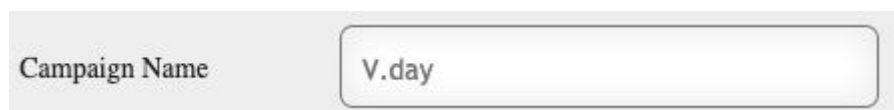
A screenshot of a web form showing a label "Caller ID" on the left. To its right is a text input box containing the number "15".

13. Click the “Called Number” input box, type the called number.


-
14. If the call is created due to the campaign call, in the “Contact ID” input box, type the ID value of the contact record that is linked to the campaign call.
 15. If the call is created due to a campaign, in the “Contact CRM ID” input box, type the special ID value linked to this call that is given to contact. (e.g., If the contact is going to be paired with 3rd party CRM this may be the ID value in the system)
 16. Click the “Campaign Queue ID” input box, type the queue ID of the related campaign. An example is shown below:

A screenshot of a web form showing a label "Campaign Queue ID" followed by a text input box containing the value "campaignqueueid".

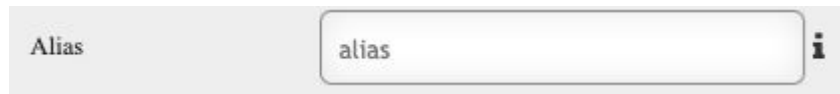
17. Click the “Campaign Name” input box, type the name of the related Campaign. An example is shown below:

A screenshot of a web form showing a label "Campaign Name" followed by a text input box containing the value "V.day".

18. Click the “Campaign List Name” input box, type the list name of the related Campaign.
19. Click the “Session Key ” input box, type the agent’s session key.
20. Click the “Source Tenant” input box, type the first tenant where the call starts in the layout shown below (sometimes a call can circulate multiple tenants)

A screenshot of a web form showing a label "Source Tenant" followed by a text input box containing the value "source". To the right of the input box is a small information icon (a lowercase 'i' inside a circle).

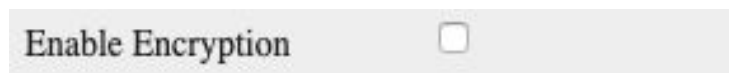
-
21. Click the “Alias” input box, type the agent’s internal number in the layout shown below:



22. Click the “Event” input box, type the event transpiring in call notification requests (E.g., ringing, noanswer, hangup, etc.).
23. Click the “Custom Fields” input box, type the additional information in the record of the list loaded during campaign calls (e.g., identity number, address, etc.) in the layout shown below:



24. Click the “Answered By” input box, type the information that is going to be sent in the case of the call’s answering field being full.
25. Click the “Disposition” input box, type the result code coming from the operator at the end of the call when the call is outgoing call or the incoming call is transferred from the IVR.
26. Check the following checkbox to Enable Encryption.



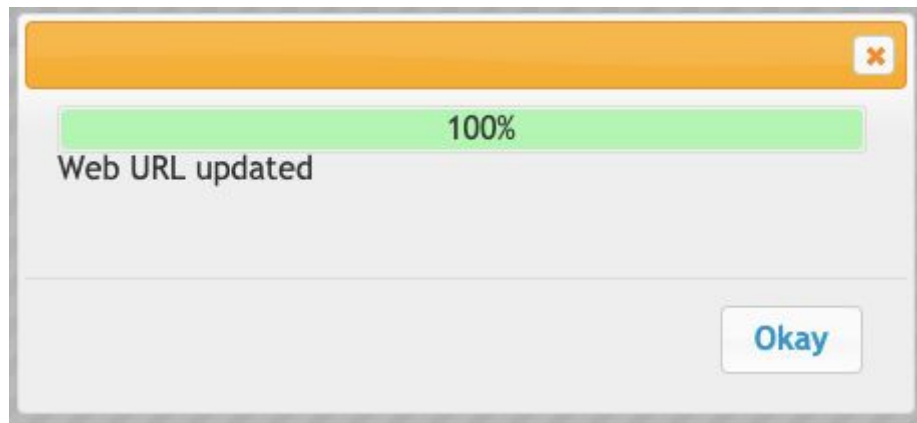
27. Click the “Encryption Key” input box, type the encryption key. (The enciphering information in the browser address bar URL of the agent screen’s pop-up).


28. Click the “Encryption Method” input box and type the encryption method.

29. After all the desired additions have been made, click the save button,



the following pop-up window will appear:



30. Click the Okay button, , to acknowledge the addition. The new contact will be located in the contact list as seen below:

Popup	Call ID ▲	Queue	Agent Email	Caller ID	Contact Key	Campaign ID	
Fatih 21			fatih.koc@callcenterstudio.com				 
Param's Test		202199928					 
wtxpopup	callkey	5	fatih.koc@callcenterstudio.com	15			 

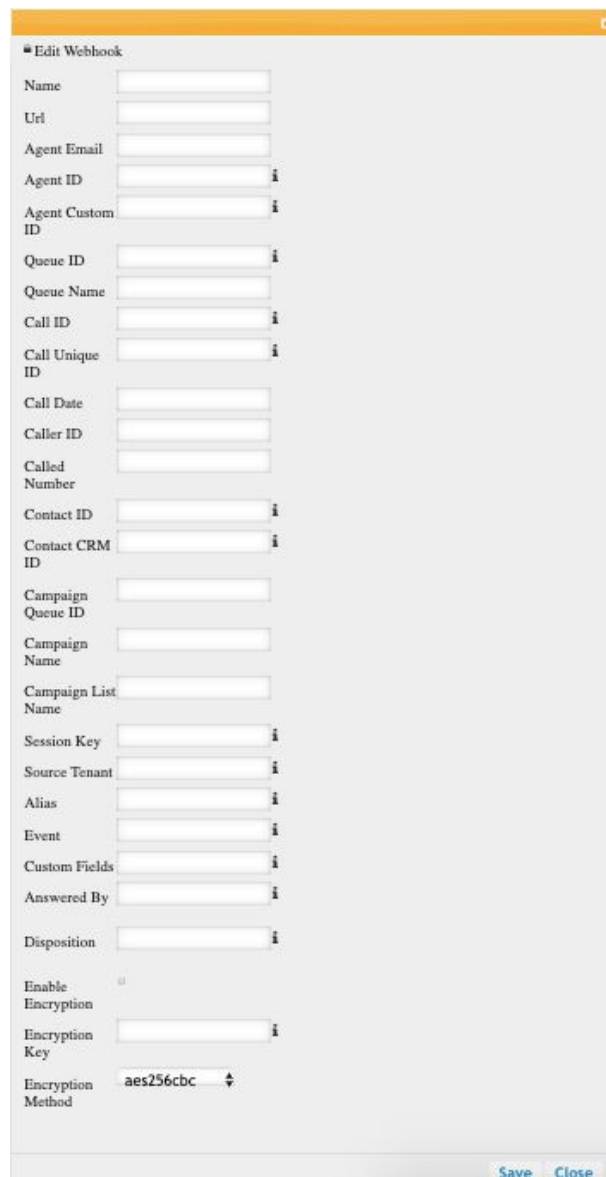
Editing a Webhook

1. To edit a webhook, click the edit button, , located on the far right of the Webhook

Name after the “Campaign ID column” shown below:



After clicking the edit button, the contact pop-up window will appear as shown:



Edit Webhook

Name

Url

Agent Email

Agent ID ⓘ

Agent Custom ID ⓘ

Queue ID ⓘ

Queue Name

Call ID ⓘ

Call Unique ID ⓘ

Call Date

Caller ID

Called Number

Contact ID ⓘ

Contact CRM ID ⓘ

Campaign Queue ID

Campaign Name

Campaign List Name

Session Key ⓘ

Source Tenant ⓘ

Alias ⓘ

Event ⓘ

Custom Fields ⓘ

Answered By ⓘ


Disposition ⓘ

Enable Encryption ☐

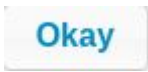
Encryption Key ⓘ

Encryption Method ⓘ

2. Make changes as desired.
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes.

Deleting a Webhook

1. From the Webhook list, click the delete button, , to the right of the edit button, .



When the delete button is clicked the following pop-up will appear:


demo2.callcenterstudio.com says

xxx popup will be deleted permanently. Do you want to continue?

Cancel

OK

- Select the “Cancel” button, , to cancel the deletion.
- Select the “OK” button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted webhook will not be shown.

Refreshing the Statuses Page

To refresh the page, click the refresh button,



Searching for a Webhook

1. The “Popup” input box can be used to find webhooks quickly:

A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Popup" is written in a medium gray font. To the right of the text is a white rectangular input field with a thin gray border.

2. The “Queue” input box can be used to find webhooks quickly:

A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Queue" is written in a medium gray font. To the right of the text is a white rectangular input field with a thin gray border.

Setting Webhook

If a pop-up does not open:

- If you have defined pop-up in a queue and the pop-up screen does not open when a call arrives, perform the following:
- If a pop-up is defined in “Queue” settings, please inform the Project Manager using the following address support@callcenterstudio.com.

System Logs

- The place where logs in the system are displayed. There are records of missed calls, the logs in which customer representative status was changed by the supervisor, logs of changes in welcome menus, queues, etc.

Dialplans




Calling rules need to be defined to perform outbound calls through the system.

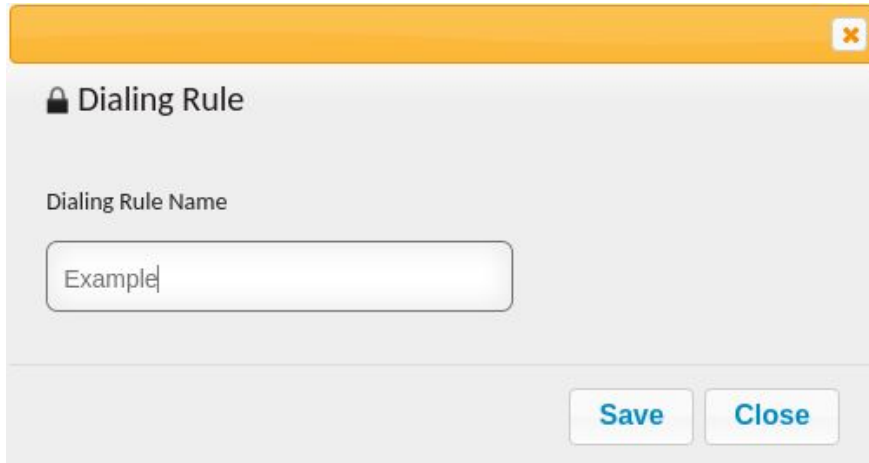
Adding a Dialplan

General Notes


- While calling rules are being defined, pay attention to the format of the phone number through which outbound calls will be made.
- While performing definitions, if a voice record is desired to be kept in the queue, the voice record checkbox should be marked.
- While the alias calling plan is being defined, in the checkmark alias box, write the first digit of the internal number defined for users inside the system in the field of the number to be called and save it.

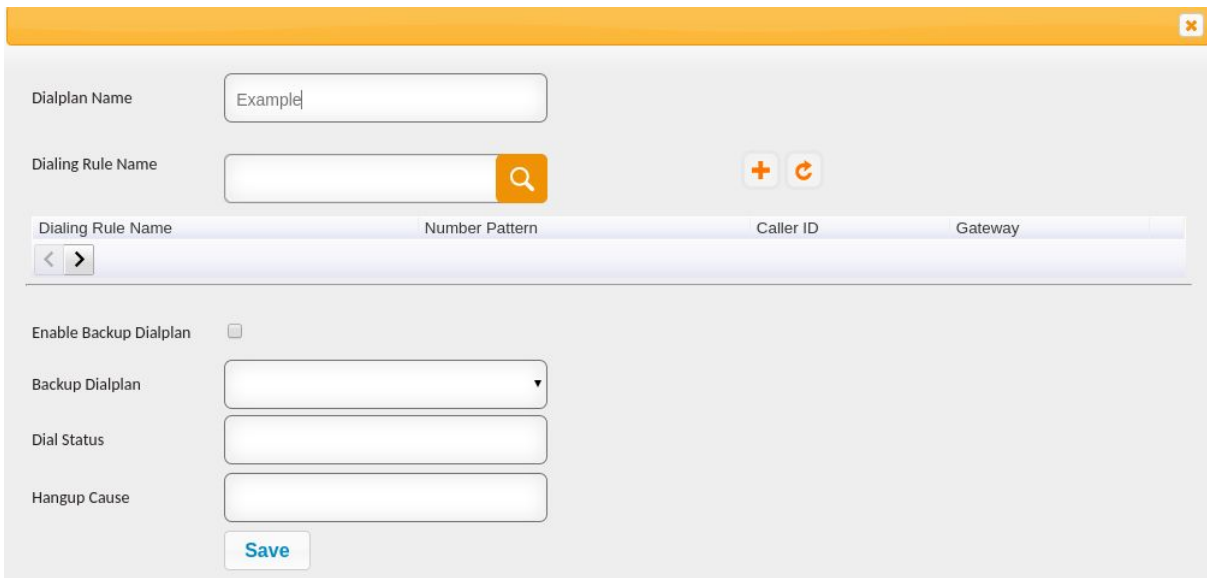
Note: The “Dialing Rule Name” input box is a mandatory field.

1. Click the “New” button,  , located in the top right corner of the screen. The following pop-up screen will appear as shown below, in the “Dialing Rule Name” input box, type the name of the dialing rule:




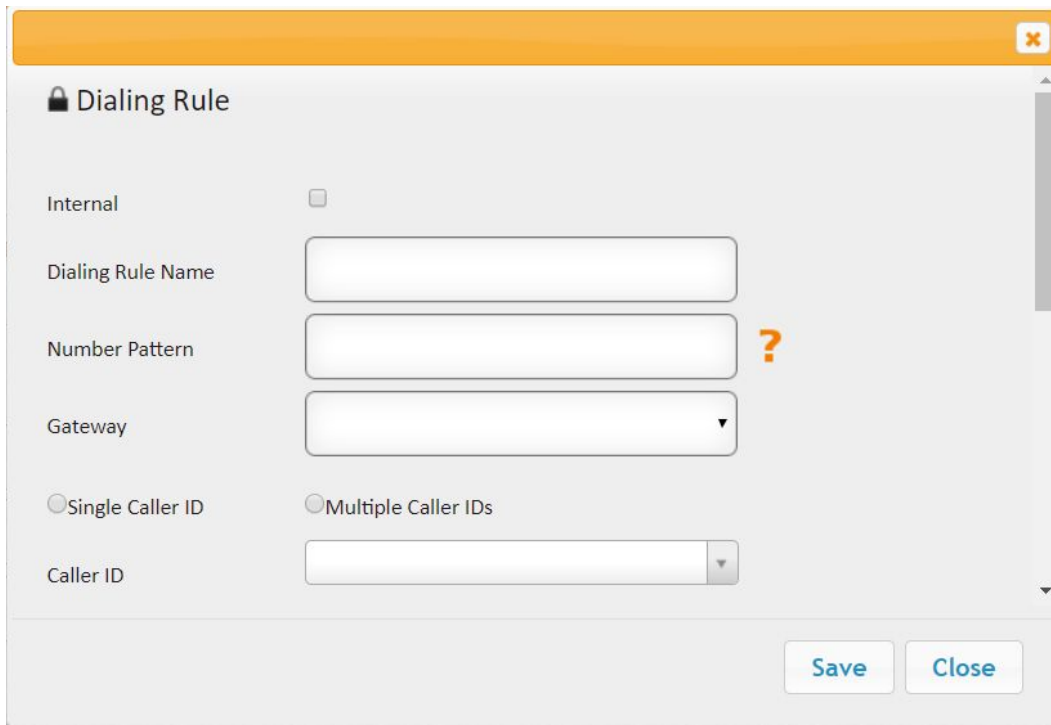
A pop-up window titled "Dialing Rule" with a close button in the top right corner. Inside, there is a label "Dialing Rule Name" above a text input field containing the word "Example". At the bottom right, there are two buttons: "Save" and "Close".

2. Once the preferred name is written, press the save button,  , the following pop-up box will appear:

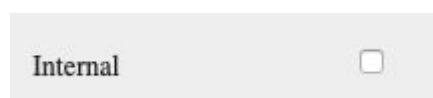


A main configuration window with a close button in the top right corner. It contains several fields: "Dialplan Name" with a text input field containing "Example"; "Dialing Rule Name" with a text input field and a search icon; a table with headers "Dialing Rule Name", "Number Pattern", "Caller ID", and "Gateway", and a row with navigation arrows; "Enable Backup Dialplan" with a checkbox; "Backup Dialplan" with a dropdown menu; "Dial Status" with a text input field; and "Hangup Cause" with a text input field. A "Save" button is located at the bottom left.

- Click the New button,  , located in the top right corner of the screen, next to the search button. The following pop-up screen will appear, as shown below:



- Check the following box to make a dialing rule for internal calls.




- Click the “Dialing Rule Name” input box, type the dialing rule name in the layout shown below:



-
6. Click the “Number Pattern” input box, type number of the pattern in the layout shown below:

Number Pattern ?

Number Pattern ?

7. For further information, click the question mark, , next to the input box of “number pattern,” then the following website screen will appear as explained on the next page:

Pattern Matching

Pattern matching allows us to create dial plan rule patterns in our dial plan that match more than one possible dialed number. Pattern matching is a time-saving measure. A rule in the dial plan can be created for the numbers that will be dialed.

Special Characters Used in Pattern Matching

Pattern matches always begin with an underscore. Within the pattern, we use various letters and characters to represent sets or ranges of numbers.

X matches any digit from 0-9

Z matches any digit from 1-9

N matches any digit from 2-9

[1237-9] matches any digit or letter in the brackets (in this example, 1,2,3,7,8,9)

[a-z] matches any lower case letter

[A-Z] matches any UPPER case letter

. wildcard, matches one or more characters

! wildcard, matches zero or more characters immediately

Examples

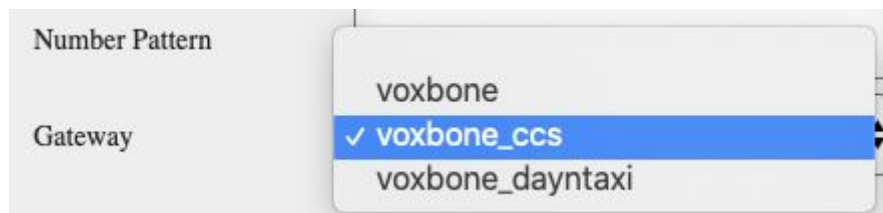
_33XX

_053XXXXXXXXX

_05X.

_0216X.

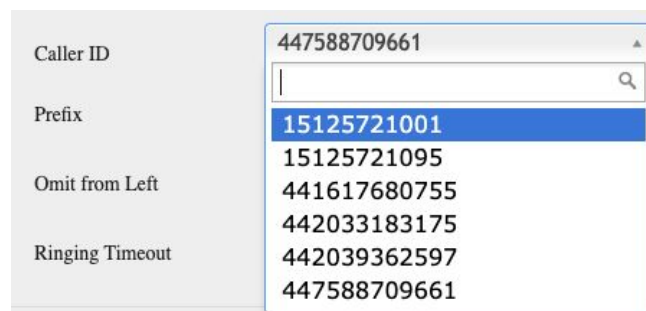
8. Click the “Gateway” section, choose the preferred one for choosing CRM as shown below:



9. Single or multiple caller ID options can be selected here. Only one selection can be made as shown below:



10. Click the desired caller ID, from the dropdown list, if down correctly the selection will look like the picture below:



11. Click the “Prefix” input box, type the preferred prefix.

12. This function is used for regulating the usage of numbers. For instance, if the number is 1 737 212 98 66 in the CRM and you type 1 to this section, the tenant will omit the first number from the left and call 737 212 98 66. If you type 0, then it will not omit anything. Click the “Omit from Left” input box, type the number of omissions from left in the layout shown below:

Omit from Left	<input type="text" value="0"/>
----------------	--------------------------------

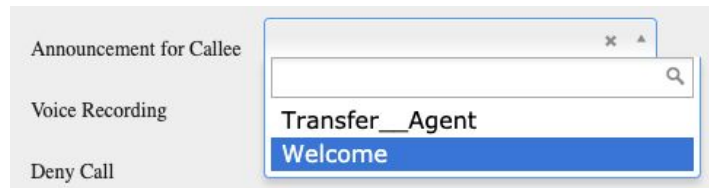
13. Click the “Ringing Timeout” input box, type duration of ringing timeout in seconds in the layout shown below:

Ringing Timeout	<input type="text" value="50"/>
-----------------	---------------------------------

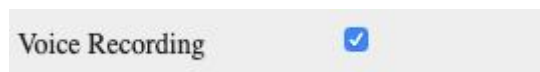
14. Call diversion is a telephony feature of some telephone switching systems, which redirects a telephone call to another destination where the desired called party is available. Click the desired “Diversion Code,” from the dropdown list, if down correctly the selection will look like the picture below:

Diversion Code	<input type="text" value="15125721095"/>
Announcement for Callee	<input type="text" value="15125721001"/>
Voice Recording	<input type="text" value="15125721095"/>
Deny Call	<input type="text" value="441617680755"/>

15. Click the desired “Announcement for Callee,” from the dropdown list. An example list is shown below (Announcements can be added in the Announcement Section):



16. Check the following box to enable voice recording in the related dialing rule.



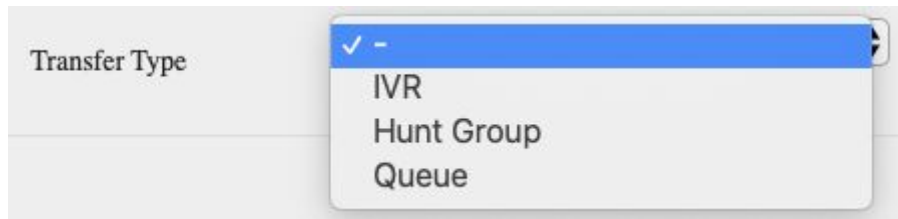
17. Check the following box to enable denying calls in the related dialing rule.




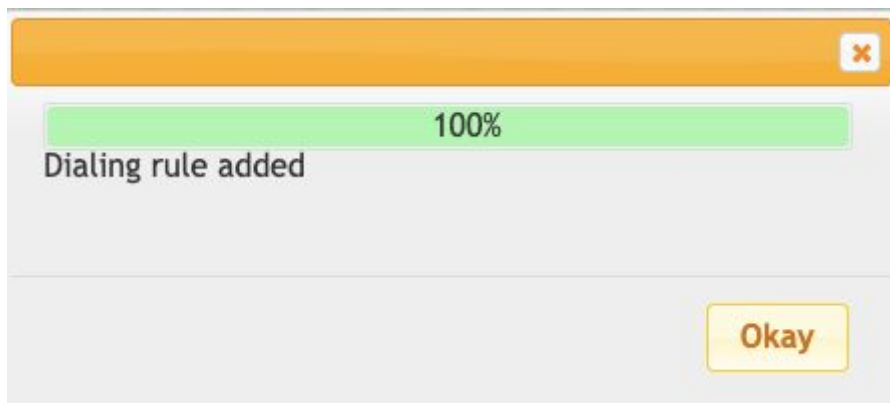
18. Click the desired “Location,” from the dropdown list, if down correctly the selection will look like the picture below:

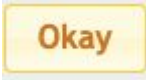


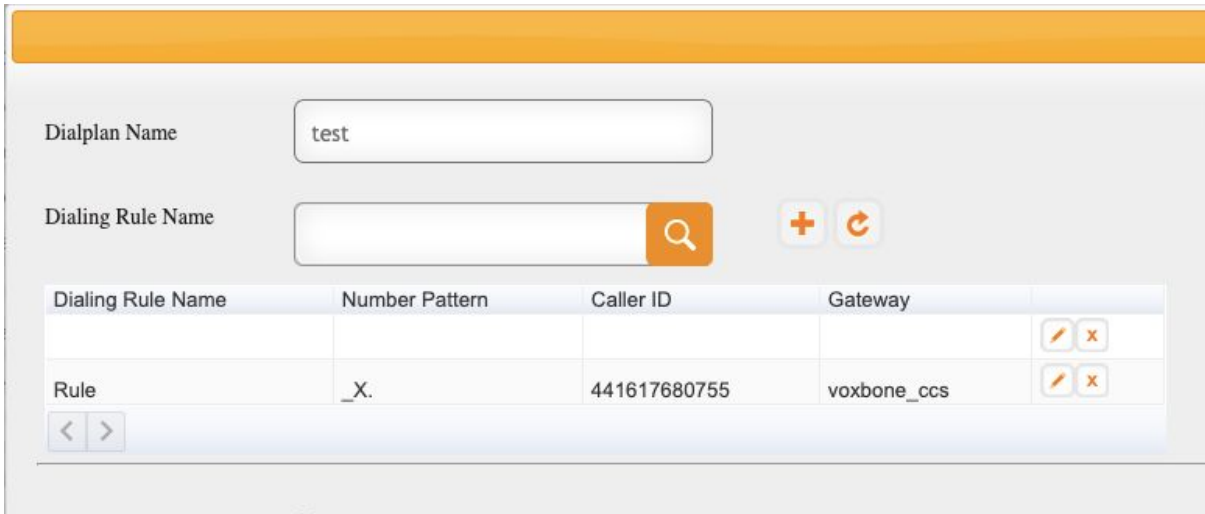
19. Click the desired “Transfer Type,” from the dropdown list, if down correctly the selection will look like the picture below:





20. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



21. Click the Okay button, , the new dialing rule will be located in the list as seen below:

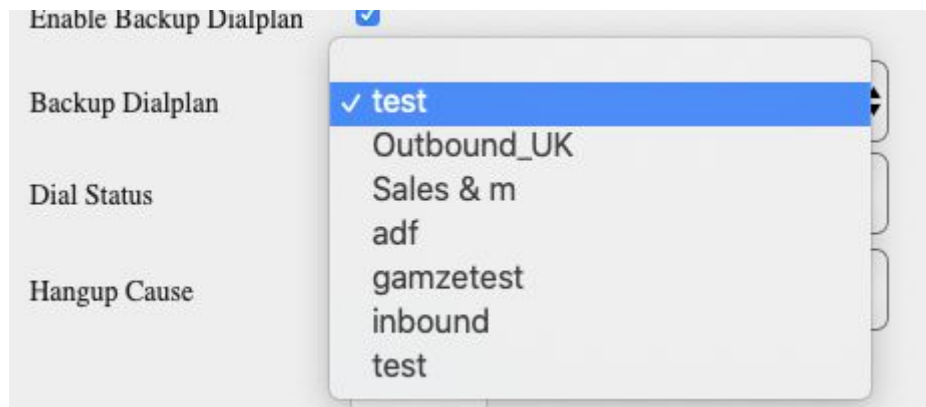


Dialing Rule Name	Number Pattern	Caller ID	Gateway	
Rule	_X.	441617680755	voxbone_ccs	 

22. Check the following box, to enable backup dialplan in the related dialing rule.

Enable Backup Dialplan ☒

23. Click the desired “Backup Plan,” from the dropdown list, an example list is shown below:




Enable Backup Dialplan ☒

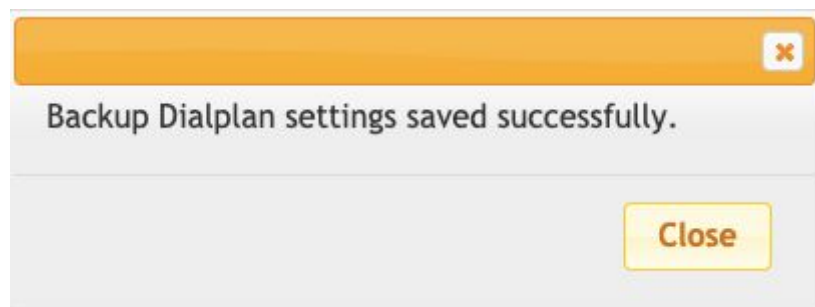
Backup Dialplan


- ✓ test
- Outbound_UK
- Sales & m
- adf
- gamzetest
- inbound
- test

24. The Dial Status is the condition to forward the call to the backup dialplan. These are statuses in writing that occurs in the operator tenant based on the call status. Click the “Dial Status” input box, type the preferred dial status.

25. The Hangup Cause is the condition to forward the call to the backup dialplan. It is a numeric value that occurs in the operator tenant, based on the call status. Click the “Hangup Cause” input box, type the preferred hangup cause.

26. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



27. Click the Close button, , the Backup Dialplan will be located in the list as seen below:

Dialplan Name	
Dialplan Name ▲	Deleted
Outbound_UK	 
Sales & m	 
US	 
gamzetest	 
inbound	 
test	 
 	

Searching for a Dialing Rule

To facilitate ease in searching for dialing rules, the input box to the left of the “Add” button can be used to find dialing rules quickly, as shown below:



The screenshot shows the 'Dialing Rule Name' search bar with the text 'rule' entered. To the right of the search bar are two buttons: a plus sign (+) and a refresh button (circular arrow). Below the search bar is a table with the following columns: 'Dialing Rule Name', 'Number Pattern', 'Caller ID', and 'Gateway'. The table contains one row with the following data: 'Rule', 'X.', '441617680755', and 'voxbone ccs'. To the right of the table are two buttons: a pencil icon and an 'x' icon. Below the table are two navigation buttons: a left arrow (<) and a right arrow (>).

Dialing Rule Name	Number Pattern	Caller ID	Gateway
Rule	X.	441617680755	voxbone ccs

Refreshing the Dialing Rules Page

To refreshing the page, click the refresh button,

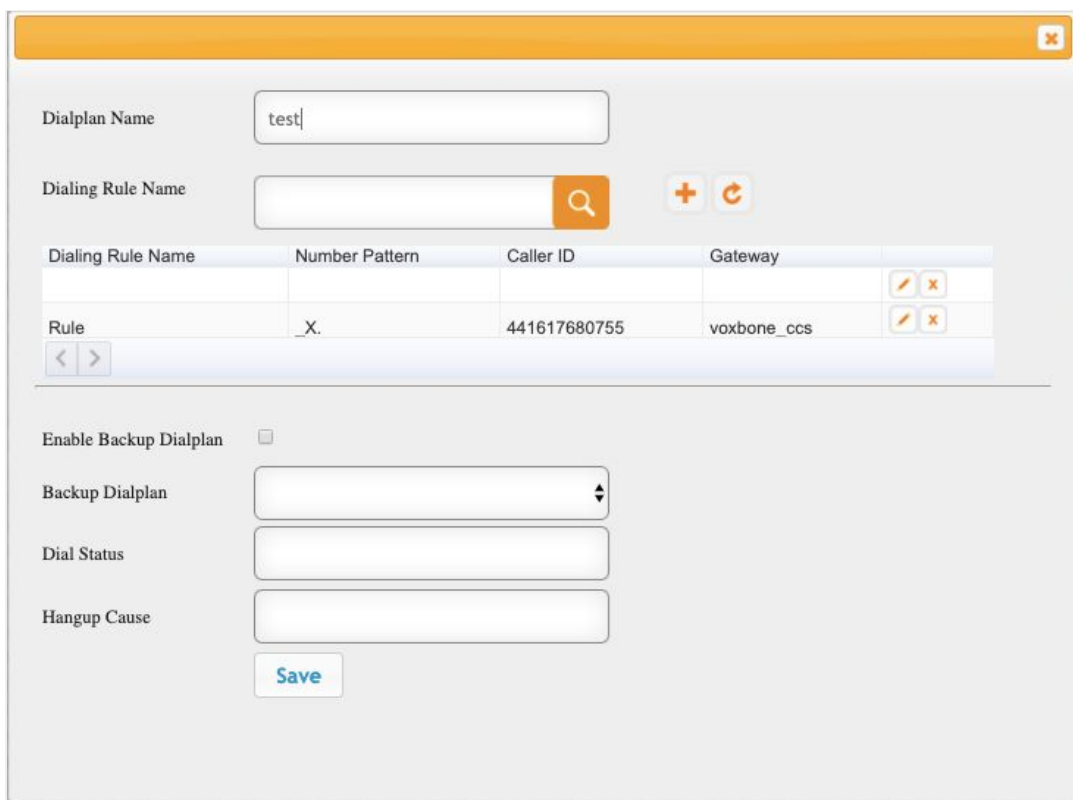




Editing a Dialplan

- To edit a dialplan, click the “Edit” button, , located on the far right of the Dialplan Name as shown below:




After clicking the edit button, the dialplan pop-up window will appear as shown:

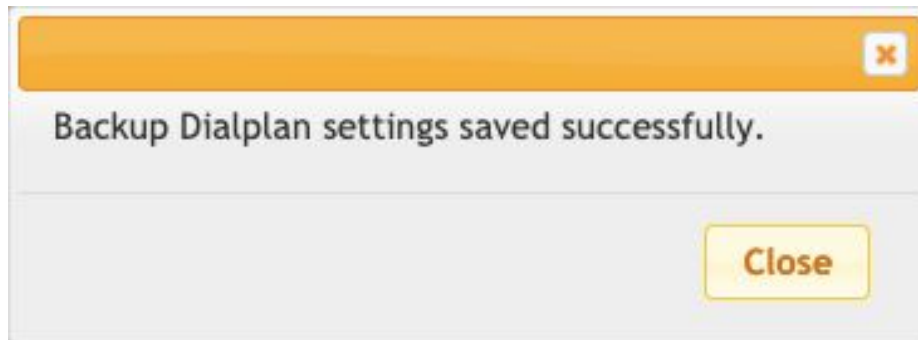


Dialing Rule Name	Number Pattern	Caller ID	Gateway	
Rule	_X.	441617680755	voxbone_ccs	 

- Make changes as desired.

-
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:





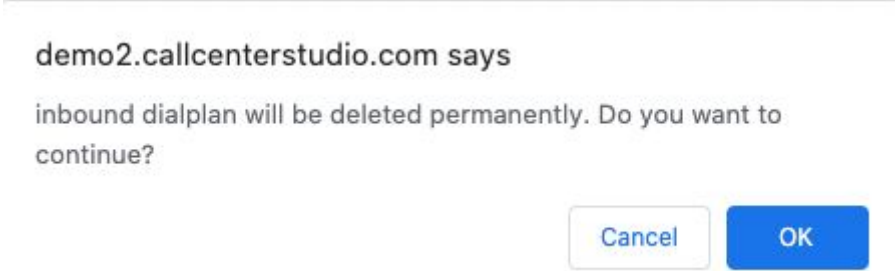
4. Click the “Close” button, , to confirm the changes.

Searching for a Dialplan Name

1. In the “Dialplan Name” input box, type the desired name or partial name of the desired dialplan.

Deleting a Dialplan



1. From the dialplan list, click the “Delete” button, , to the right of the “Edit” button, . When the delete button is clicked the following pop-up will appear:



demo2.callcenterstudio.com says
inbound dialplan will be deleted permanently. Do you want to continue?

Cancel

OK

- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted webhook will not be shown.

Refreshing the Dialplan Page

To refreshing the page, click the refresh button, .

Teams



All customer representatives can be gathered under different teams in the system. Customer representatives on the same team can follow one another and send messages to the supervisor of the team. Supervisors can take reports based on the team and send collective messages to users added to the team.


Creating a Team

In the input box (in the top left corner of the “Teams module” shown below:

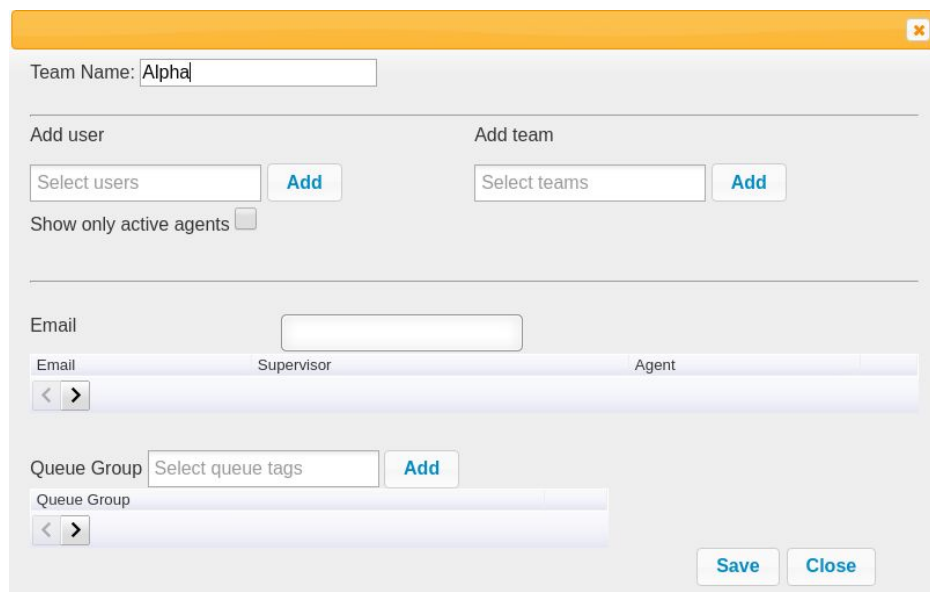


A screenshot of the Teams module interface. It features a text input box with a vertical cursor on the left and an orange 'Create' button to its right.

1. Type the name of the team; you wish to create (Ex. Alpha)

2. Press the Create button,  .

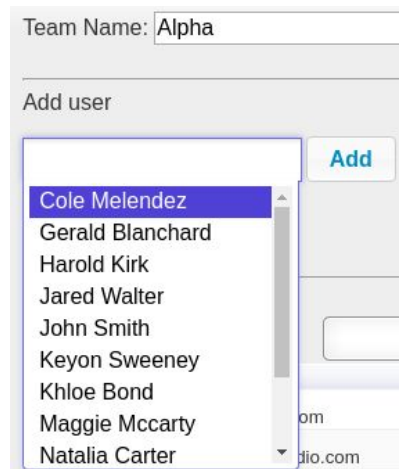
Once the Create button is clicked, a pop-up window will appear as shown below:



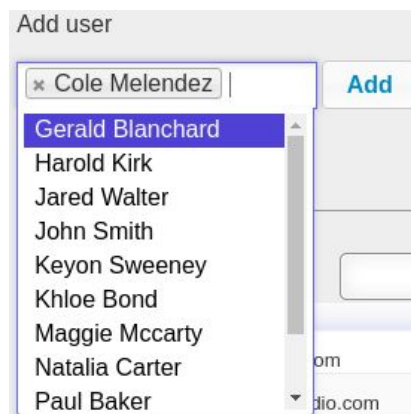
A screenshot of a pop-up window for creating a team. The window has an orange title bar with a close button. Inside, the 'Team Name' field contains 'Alpha'. Below this are two sections: 'Add user' and 'Add team'. The 'Add user' section includes a 'Select users' dropdown, an 'Add' button, and a 'Show only active agents' checkbox. The 'Add team' section includes a 'Select teams' dropdown and an 'Add' button. Below these is an 'Email' field, followed by a table with columns for 'Email', 'Supervisor', and 'Agent'. Below the table are navigation arrows. At the bottom, there is a 'Queue Group' section with a 'Select queue tags' dropdown, an 'Add' button, and another table with 'Queue Group' and navigation arrows. Finally, 'Save' and 'Close' buttons are at the bottom right.

The pop-up window appears for the team name, “Alpha.”

3. Add users to the team by clicking the “Select users” input box, a dropdown list of available users will appear, as shown below:

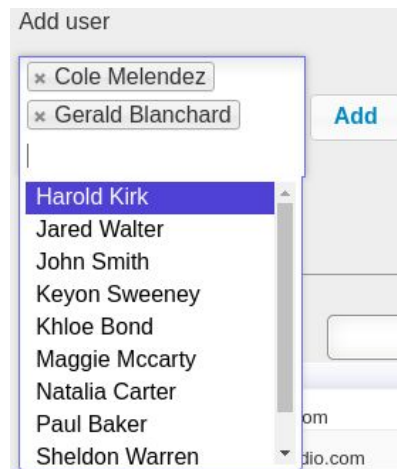


4. Click the desired user, “Cole Melendez,” from the dropdown list, if down correctly the selection will look like the picture below:



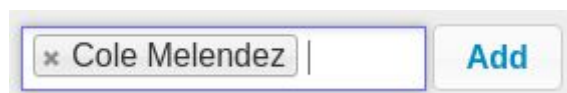
Note: To facilitate speed in adding users, multiple users can be selected, for example,


“Gerald Blanchard,” can be selected as shown below:

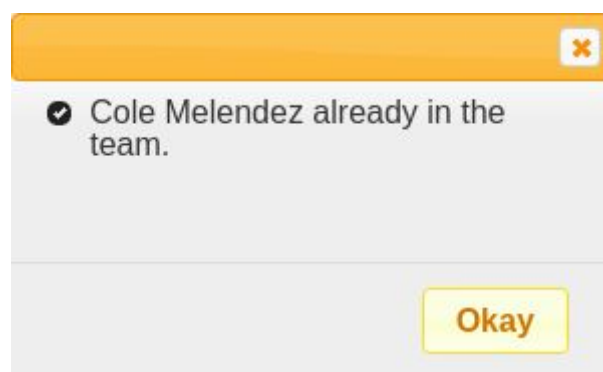


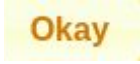
Both of the desired users that were clicked are added to the input box, if a user was clicked

by accident the user can be deleted by pressing the, “X,” to the left of the user’s name:



5. To add the user (“Cole Melendez”) to the team, press the add button, , if done correctly the following pop-up window will be displayed:



6. Click the Okay button, , once the user is added, the user will be listed as shown below:



Email	Supervisor	Agent	
cole.melendez@callcenterstudio.com	✓	✓	

Note: The access level is also listed. In this example, Cole Melendez is both a Supervisor and an Agent indicated by the checkmarks.

To facilitate ease in searching for team members, the input box to the right of Email can be used to find team members quickly, as shown below:





Using this input box, type the user's email to find them within the Team member list easily.

Shown below:



Email	Supervisor	Agent	
cole.melendez@callcenterstudio.com	✓	✓	



Team members can be deleted here as well by pressing, , to the right of checkmarks. If the, , is clicked the pop-up below will be shown to confirm the deletion:

demo.callcenterstudio.com says

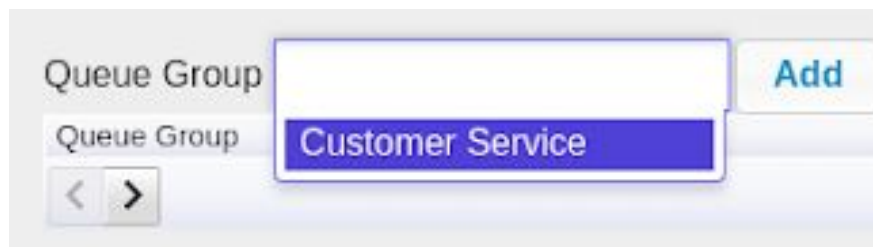
cole.melendez@callcenterstudio.com; queue will be deleted permanently. Do you want to continue?

Cancel

OK

- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

7. Once users are added, the team can be added to a queue. Add a team to a queue clicking the “Select queue tags” input box, a dropdown list of available queues will appear, as shown below:




8. Click the desired queue, “Customer Service,” from the dropdown list, if down correctly the selection will look like the picture below:





Note:

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, “X”, to the left of the queue name.*

9. To add the queue (“Customer Service”) to the team, press the add button, , if done correctly the queue will be displayed under the “Queue Group” list as shown below:



Queues can be deleted here as well by pressing, , to the right of the queue name. If the,



, is clicked the pop-up below will be shown to confirm the deletion:

demo.callcenterstudio.com says


Customer Service - will be removed. Do you want to continue?

Cancel

OK

- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

10. Once the user and queue selection is complete, the information can be saved by

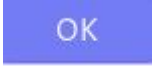
clicking the save button, , the following pop-up box will appear:

demo.callcenterstudio.com says

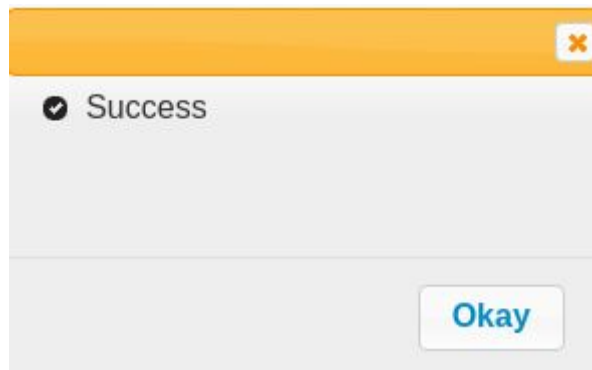
There are queue groups in team. Do you want to update all team members?

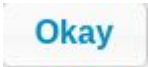
Cancel

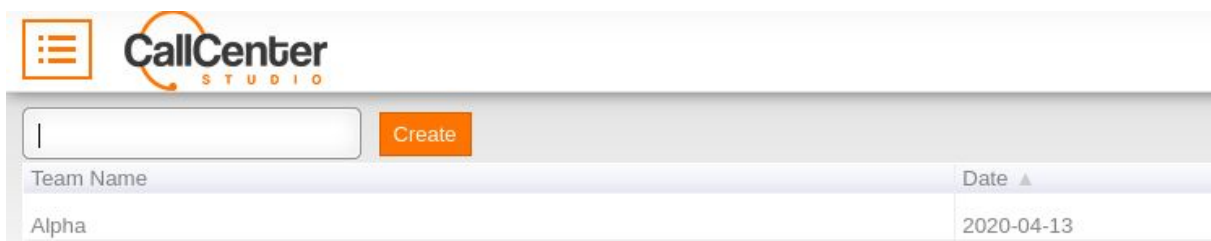
OK

11. Click the Ok button, , to confirm the update.


After pressing the Ok button, the following pop-up window will be displayed to acknowledge the addition of the team:



12. Click the Okay button, , the new team will be added to the Team Name list as shown below:

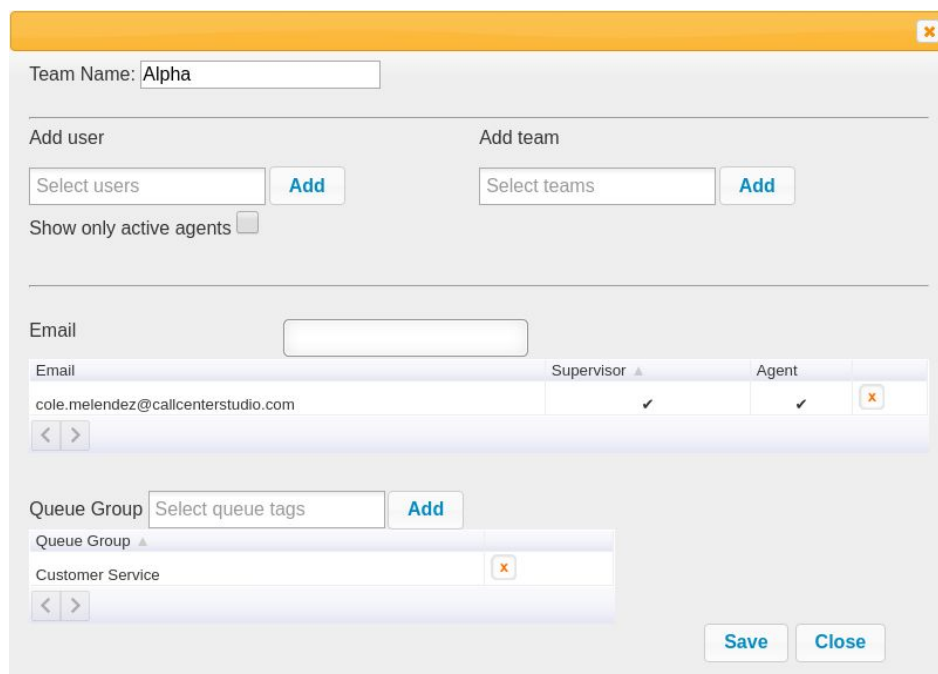


Editing a Team

1. To edit a team, click the edit button, , located on the far right of the Team Name after the “Deleted Column” as shown below:




After clicking the edit button, the team pop-up window will appear as shown:

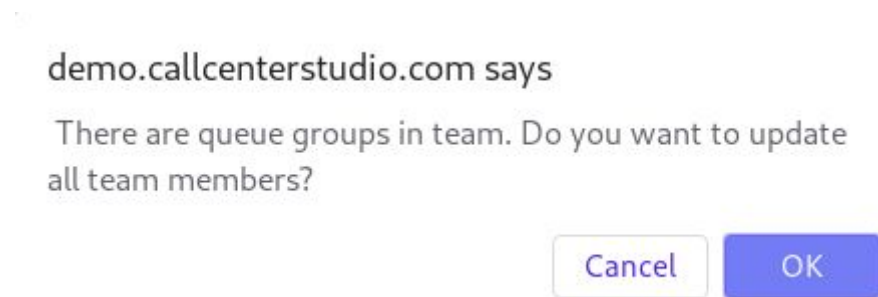


All edits can be made using this pop-up window, such as adding and changing users and teams.

2. Make changes as desired.

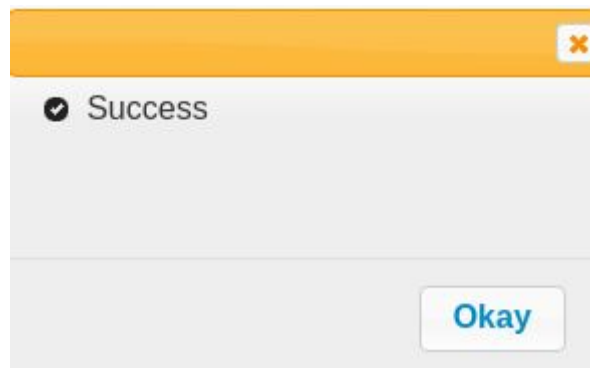
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



4. Click the Ok button, , to confirm the update.


After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:



5. Click the Okay button, , to confirm the changes.

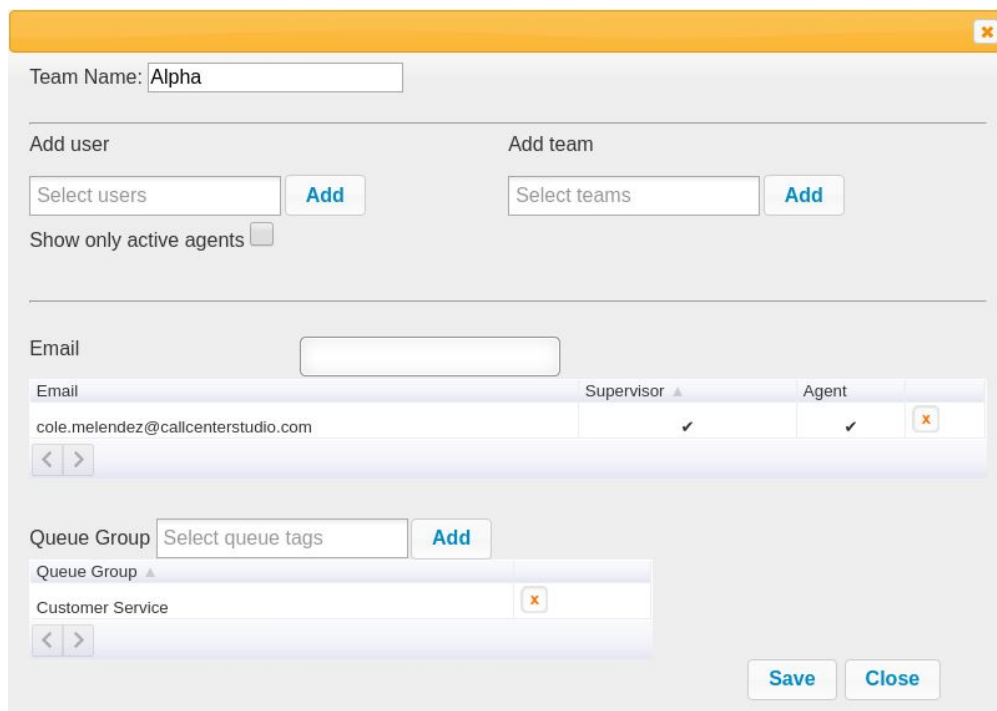
Adding another Team to an Existing Team

Team members from an existing team can be added to another team using the process outlined below:

1. Click the edit button, , located on the far right of the Team Name after the “Deleted Column” as shown below:



After clicking the edit button, the team pop-up window will appear as shown:

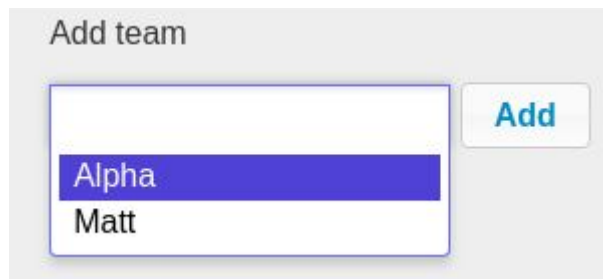


The screenshot shows a team pop-up window with the following fields and controls:

- Team Name:** Alpha
- Add user:** Select users (dropdown) and Add button.
- Add team:** Select teams (dropdown) and Add button.
- Show only active agents:** checkbox.
- Email:** Input field.
- Table:**

Email	Supervisor	Agent	
cole.melendez@callcenterstudio.com	✓	✓	X
- Queue Group:** Select queue tags (dropdown) and Add button.
- Queue Group:** Customer Service (dropdown) and X button.
- Buttons:** Save and Close.

2. Within the team, another team can be added. Add a team to an existing team by clicking the “Select teams” input box, a dropdown list of available teams will appear, as shown below:




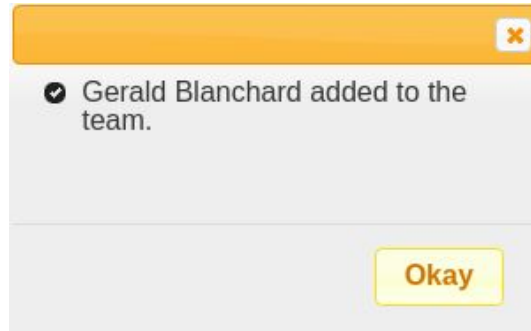
3. Click the desired team, “Matt,” from the dropdown list, if down correctly the selection will look like the picture below:

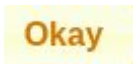


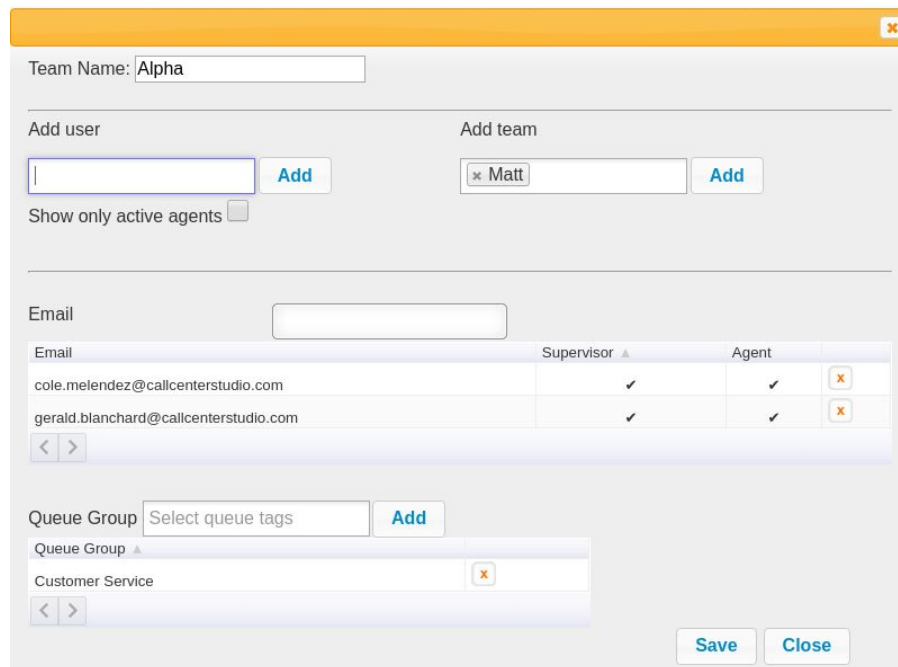
Note:

- *To facilitate speed in adding teams, multiple teams, if created, can also be selected, and added at the same time.*
- *Selected teams can also be deleted, similar to users, by clicking the, “X”, to the left of the team name.*

4. To add the team (“Matt”) to the team, press the add button,  , if done correctly, the team members will be displayed in a pop-up confirmation window as shown below:




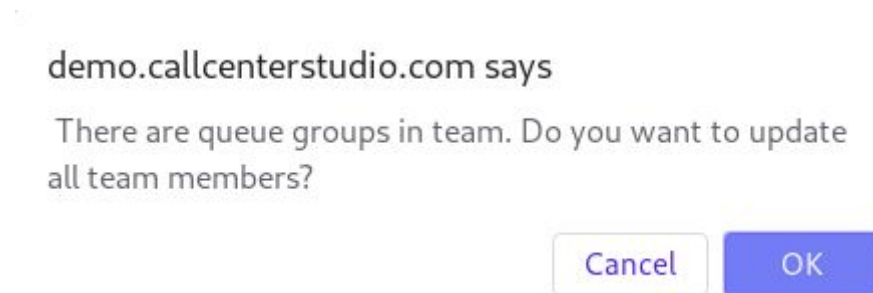
5. Click the Okay button,  , to confirm the changes. The team members from the added team, “Matt,” will be displayed with the team members from “Alpha,” as shown below:



As seen above, gerald.blanchard@callcenterstudio.com (from team “Matt”) was added to team Alpha’s member list.

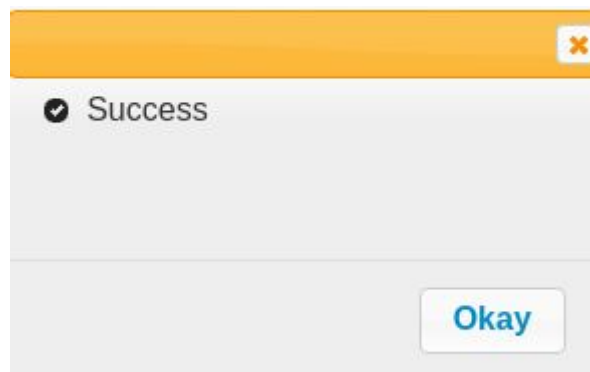
6. Once the desired changes have been completed, the information can be saved by


clicking the save button, , the following pop-up box will appear:



7. Click the Ok button, , to confirm the update.

After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:



8. Click the Okay button, , to confirm the changes.

Deleting a Team

1. From the Team Name list, click the delete button, , to the right of the edit button,





. When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

Alpha team will be deleted permanently. Do you want to continue?

Cancel

OK

- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted team will not be shown.


Contacts

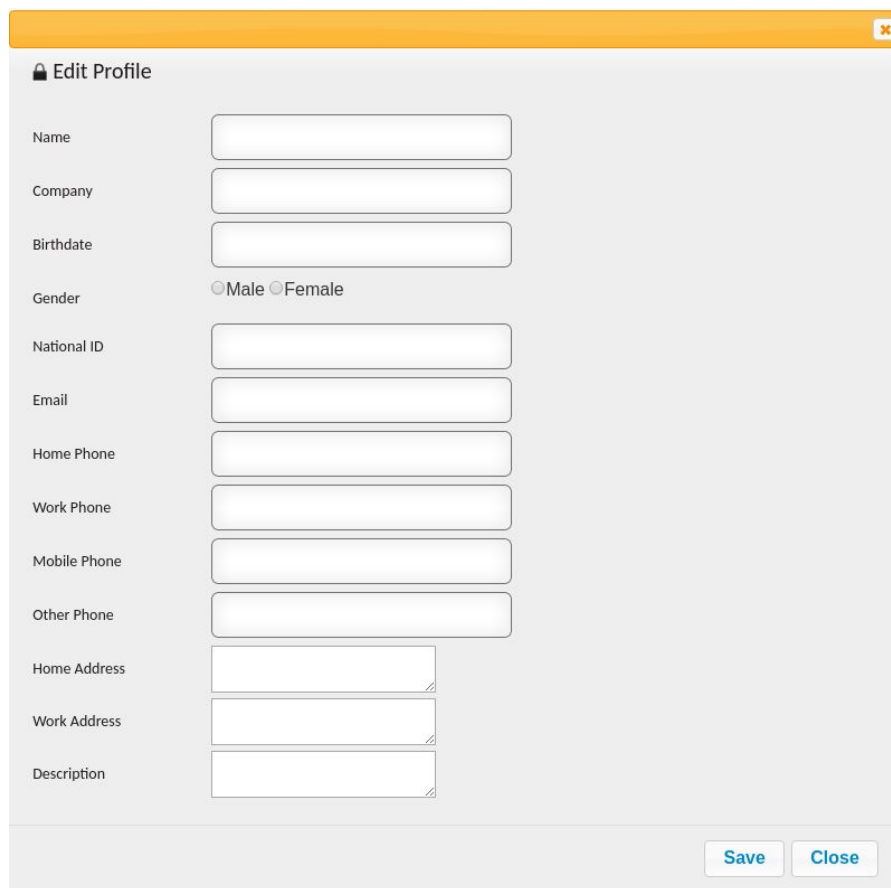


For quick and easy transfers using the contact list from the agent screen, Administrators can add, change, and modify contacts within the contacts screen.

Adding a Contact

*Note: The “Name” & “Email” input boxes are mandatory fields (See **Contact Quick Add Section** to quickly add a contact if you need more information regarding adding phone numbers, and other contact information, use the following steps).*

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear below:

A screenshot of a web-based "Edit Profile" form. The form has a light gray background and a white border. At the top, there is a title bar with the text "Edit Profile" and a close button (an 'X' icon). The form contains several input fields: "Name", "Company", "Birthdate", "National ID", "Email", "Home Phone", "Work Phone", "Mobile Phone", "Other Phone", "Home Address", "Work Address", and "Description". The "Gender" field has two radio buttons labeled "Male" and "Female". The "Home Address", "Work Address", and "Description" fields have a small icon in the bottom right corner, likely for a text area or a specific input type. At the bottom right of the form, there are two buttons: "Save" and "Close".

2. Starting from the top, in the “Name” input box, type the new contact’s first and last name as seen below:

Note: The “Name” & “Email” input boxes are mandatory fields (See Contact Quick Add Section

Name	<input type="text" value="John Smith"/>
------	---

3. In the “Company” input box, type the contact’s company’s name, as demonstrated below:

Company	<input type="text" value="John's Call Center"/>
---------	---

4. Click the birthdate input box; dates have to be entered using the following format: YYYY-DD-MM. A calendar will also appear to assist in selecting the contact’s accurate birthdate, as shown below:

Birthdate	<input type="text" value="2020-03-04"/>
Gender	
National ID	
Email	
Home Phone	

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

5. Select a gender; two selections can be made, as shown below:

A form element with a light gray background. On the left, the label "Gender" is displayed in a dark gray font. To the right of the label are two radio button options: "Male" and "Female", both in a dark gray font.

6. In the “National ID” input box, the contact’s nationality can be typed in as demonstrated below:

A form element with a light gray background. On the left, the label "National ID" is displayed in a dark gray font. To the right is a white input box with a thin gray border, containing the text "United States" in a dark gray font.

7. In the “Email” input box, type the contact’s email address as shown below:

A form element with a light gray background. On the left, the label "Email" is displayed in a dark gray font. To the right is a white input box with a thin gray border, containing the email address "johnsmith@johnscallcenter.com" in a dark gray font.

8. In the “Home Phone” input box, type the contact’s home phone number:

A form element with a light gray background. On the left, the label "Home Phone" is displayed in a dark gray font. To the right is a white input box with a thin gray border, containing the phone number "+18000000000" in a dark gray font.

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

9. In the “Work Phone” input box, type the contact’s work phone number:

A form element with a light gray background. On the left, the label "Work Phone" is displayed in a dark gray font. To the right is a white input box with a thin gray border, containing the phone number "+18000000000" in a dark gray font.

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

10. In the “Mobile Phone” input box, type the contact’s mobile phone number:

Mobile Phone	<input type="text" value="+18000000000"/>
--------------	---

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

11. In the “Other Phone” input box, type the contact’s other phone number:

Other Phone	<input type="text" value="+18000000000"/>
-------------	---

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

12. In the “Home Address” input box, type the contact’s home address, an example is shown below:

Home Address	<input type="text" value="101 John's Way, Anywhere, USA, 10000"/>
--------------	---


13. In the “Work Address” input box, type the contact’s work address, an example is shown below:

Work Address	<input type="text" value="101 John's Way, Anywhere, USA, 10000"/>
--------------	---


14. In the “Description” input box, type a description, an example is shown below:



A screenshot of a form with a label 'Description' and a text input box containing the text 'Call Center'.

15. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



16. Click the Okay button, , to acknowledge the addition; the new contact will be located in the contact list as seen below:

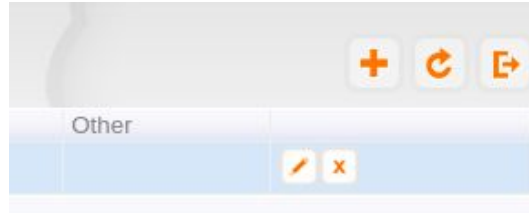


Name	<input type="text"/>	Company	<input type="text"/>
Email		Name ▲	Company
johnsmith@johnscallcenter.com		John Smith	John's Call Center
			

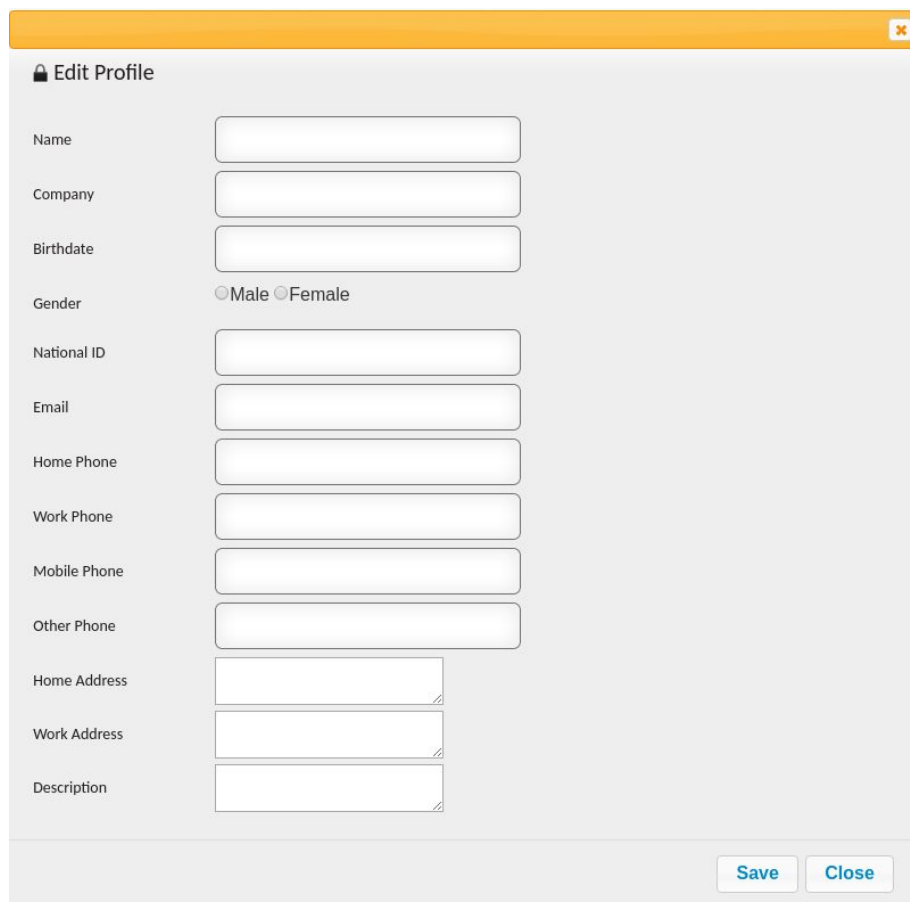
Editing a Contact

1. To edit a contact, click the edit button, , located on the far right of the Contact

Name after the “Other Column” as shown below:




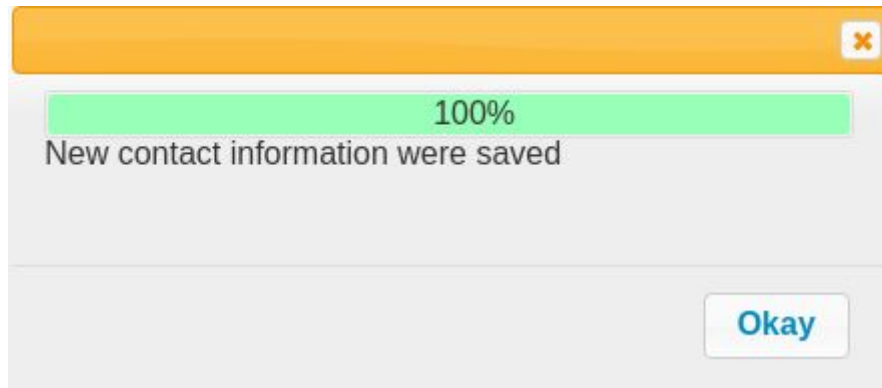
After clicking the edit button, the contact pop-up window will appear as shown:

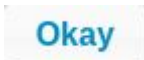
A screenshot of a pop-up window titled 'Edit Profile'. The window has a yellow header bar with a close button (X) in the top right corner. Below the header, there is a list of fields for editing contact information: Name, Company, Birthdate, Gender (with radio buttons for Male and Female), National ID, Email, Home Phone, Work Phone, Mobile Phone, Other Phone, Home Address, Work Address, and Description. Each field has a corresponding text input box. At the bottom right of the window, there are two buttons: 'Save' and 'Close'.

All edits can be made using this pop-up window, such as adding and changing contact information.


2. Make changes as desired.
3. Once the desired changes have been completed, the information can be saved by

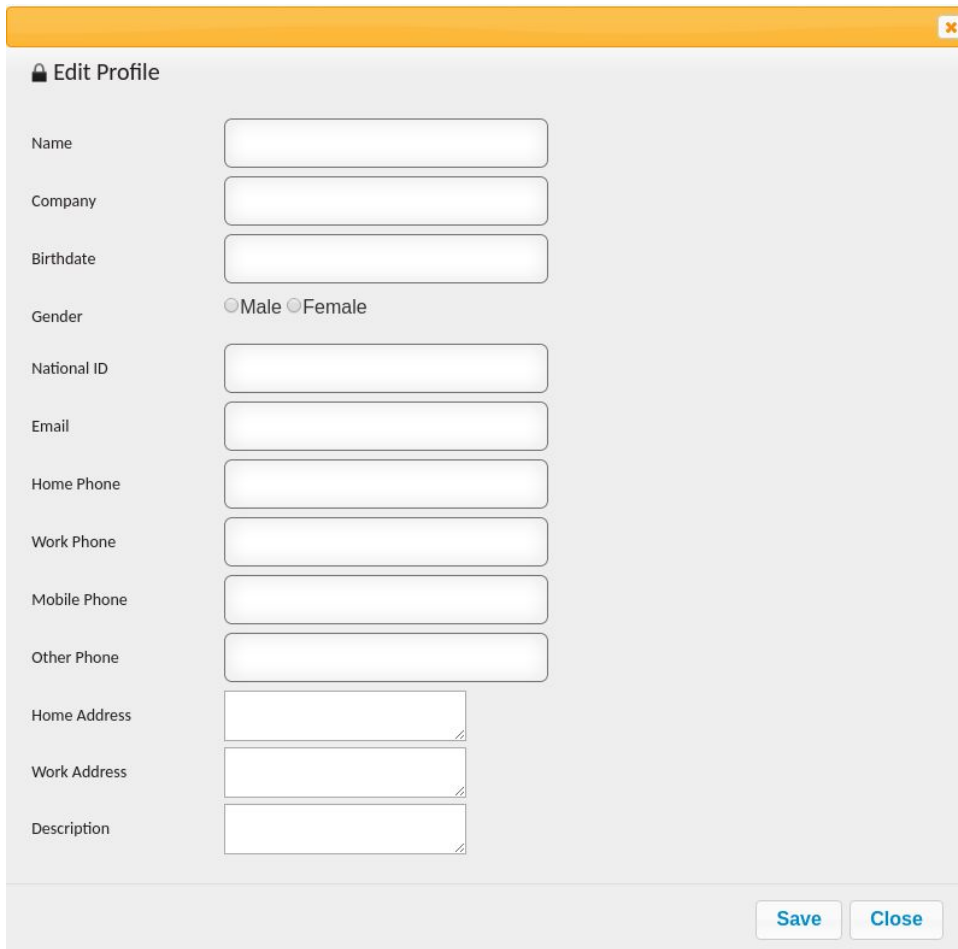
clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes.

Contact Quick Add

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:



The screenshot shows a pop-up window titled "Edit Profile" with a close button in the top right corner. The form contains the following fields and options:

- Name: Text input field
- Company: Text input field
- Birthdate: Text input field
- Gender: Radio buttons for Male and Female
- National ID: Text input field
- Email: Text input field
- Home Phone: Text input field
- Work Phone: Text input field
- Mobile Phone: Text input field
- Other Phone: Text input field
- Home Address: Text input field
- Work Address: Text input field
- Description: Text input field

At the bottom right of the form are two buttons: "Save" and "Close".

2. In the "Name" input box, type the new contact's first and last name as seen below:




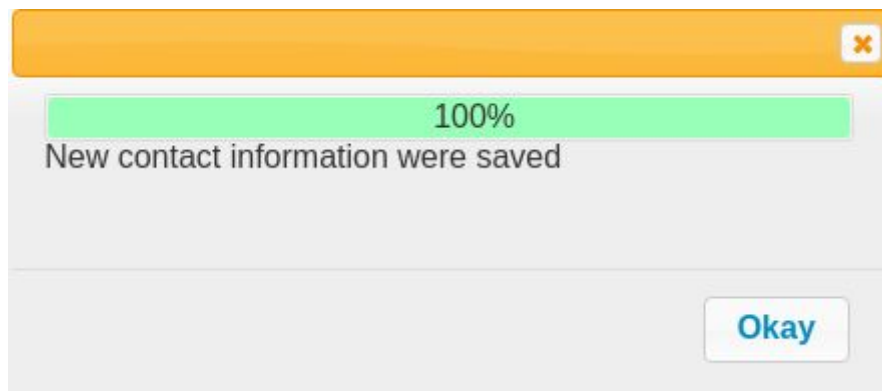
A close-up of the "Name" input field. The label "Name" is on the left, and the text "John Smith" is entered into the input box.

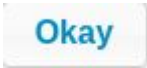
3. In the “Email” input box, type the contact’s email address as shown below:

A screenshot of a web form. On the left, there is a light gray rectangular box with the word "Email" in a dark gray font. To the right of this box is a rounded rectangular input field with a light gray border. Inside the input field, the email address "johnsmith@johnscalcenter.com" is typed in a dark gray font.

“Name” and “Email” are mandatory fields; other information can be inputted if desired.

4. Add additional contact information as desired (Refer to the **Adding a Contact** section)
5. After all the desired additions have been made, click the “Save” button, , the following pop-up window will appear:



6. Click the “Okay” button, , to confirm the changes.

Deleting a Contact

1. From the Contact Name list, click the delete button,  , to the right of the edit button,


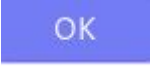
 . When the delete button is clicked, the following pop-up will appear:

demo.callcenterstudio.com says

John Smith view person will deleted permanently Do you want to continue?

Cancel

OK

- Selecting the cancel button,  , will cancel the deletion.
- Selecting the OK button,  , will confirm the deletion.

2. Confirm the deletion by clicking the OK button,  .

The screen will reload, and the deleted team will not be shown.

Importing a Contact List

A contact list can be imported to facilitate the quick addition of large quantities of contacts.

1. Write your Contact List in an excel sheet, as shown below.

HomeInsertDrawPage LayoutFormulasDataReviewView

Paste

Calibri (Body)

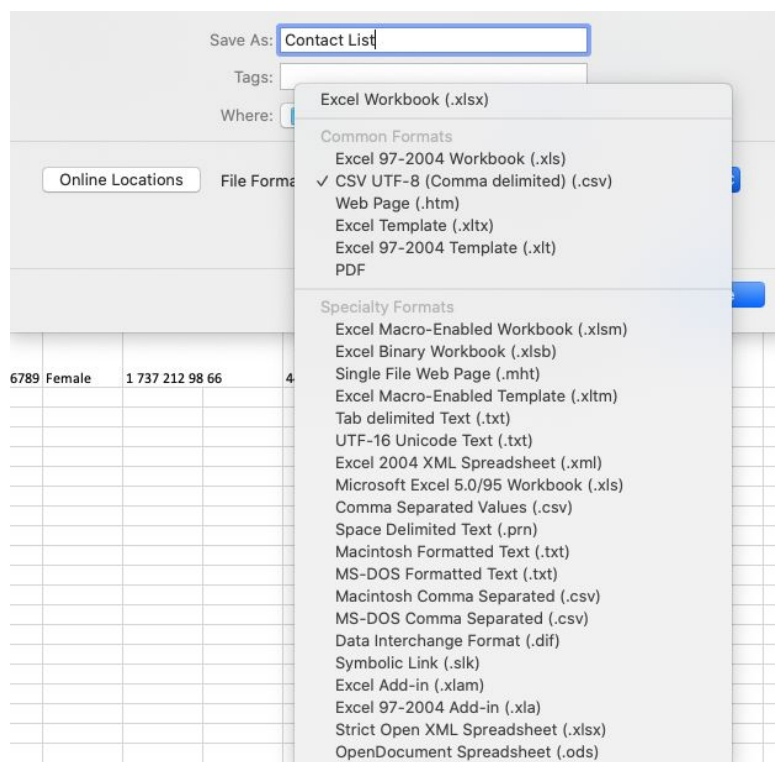
12


B

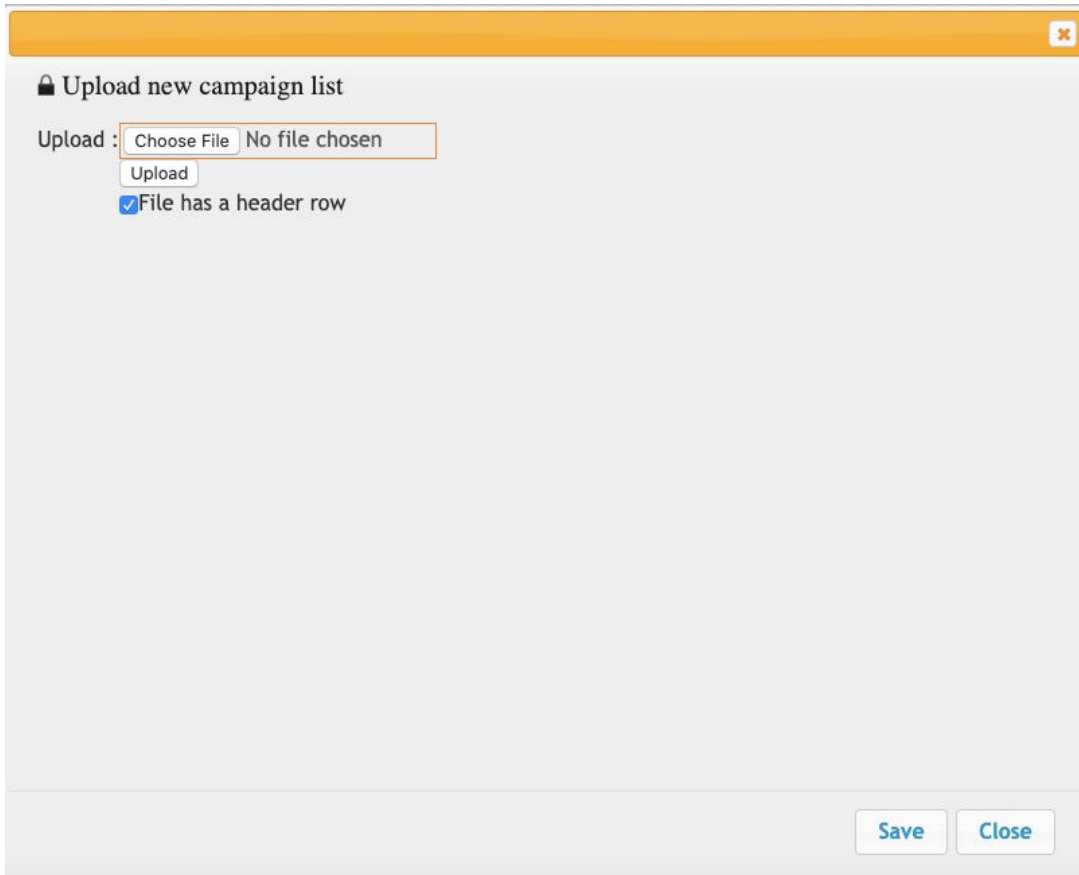
I

U

2. Go to “File> Save as” and save it in a CSV UTF-8 Format, as shown below.



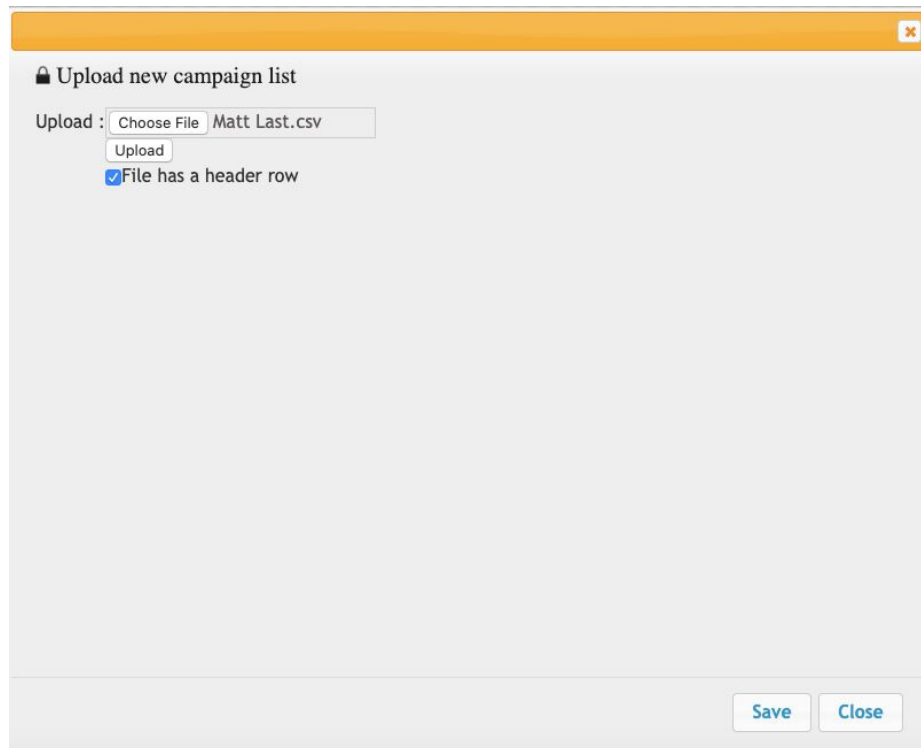
3. Click the import button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:



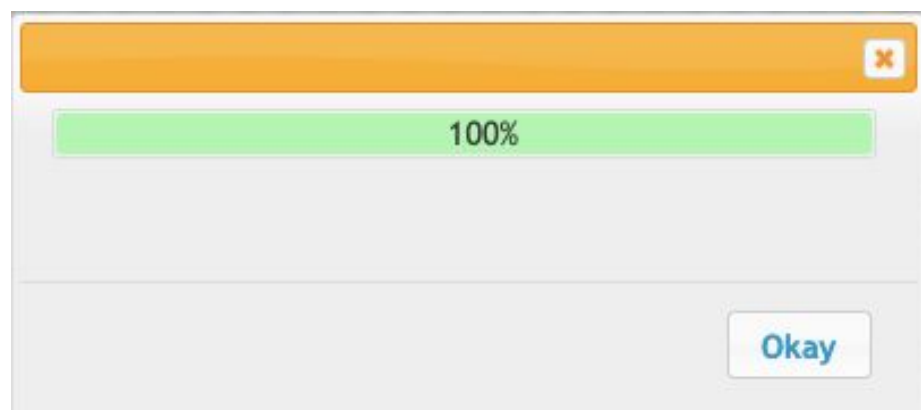
The screenshot shows a pop-up window titled "Upload new campaign list" with a close button in the top right corner. The window contains the following elements:

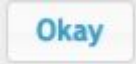
- An "Upload:" label followed by a "Choose File" button and the text "No file chosen".
- An "Upload" button below the file selection area.
- A checked checkbox labeled "File has a header row".
- "Save" and "Close" buttons at the bottom right of the window.

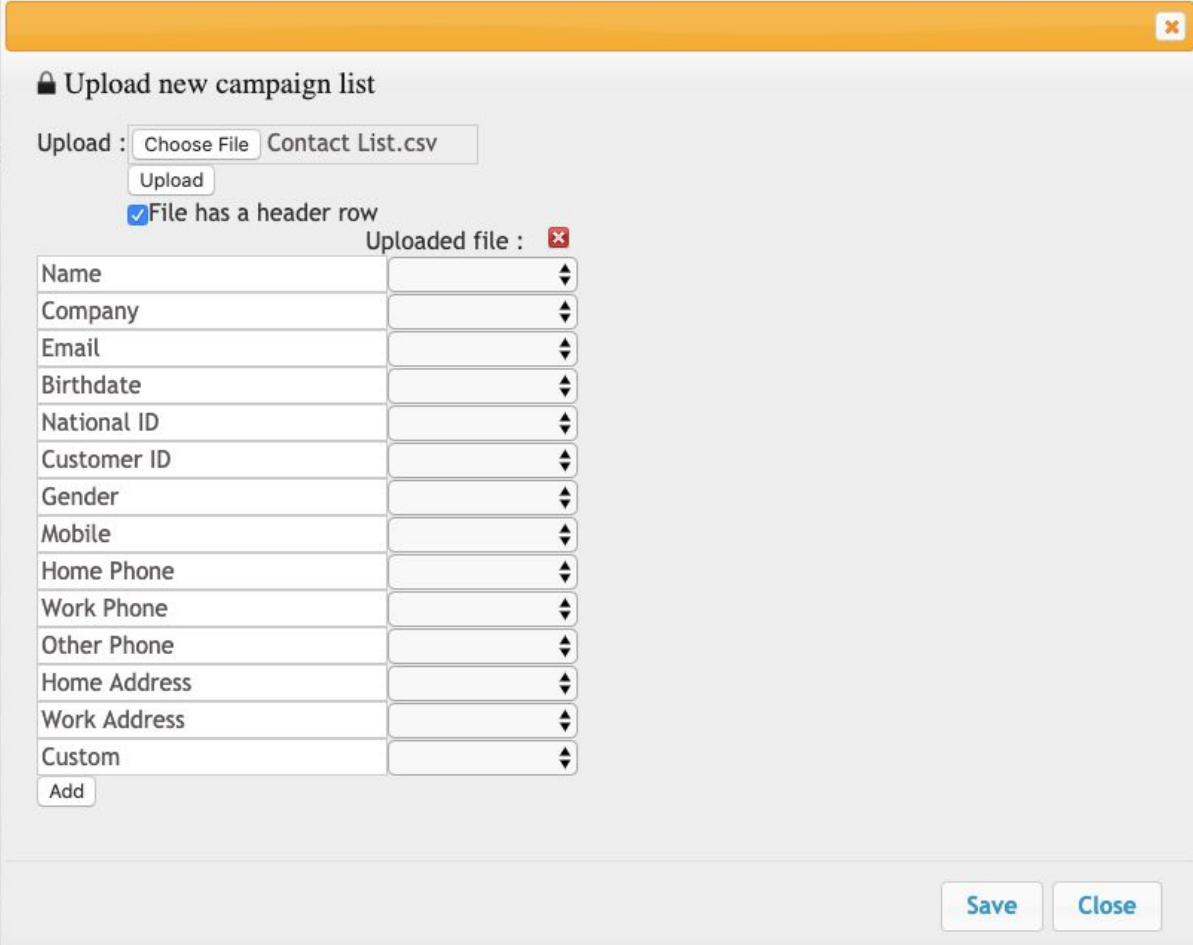
- Click the “Choose file” button and choose the saved file described above in a CSV UTF-8 format.



- Click the upload button; then the following pop-up screen will appear as shown below:



6. Click the Okay button,  , to confirm the upload. Once the uploading process is done, the following screen will be seen as shown below.



Upload new campaign list

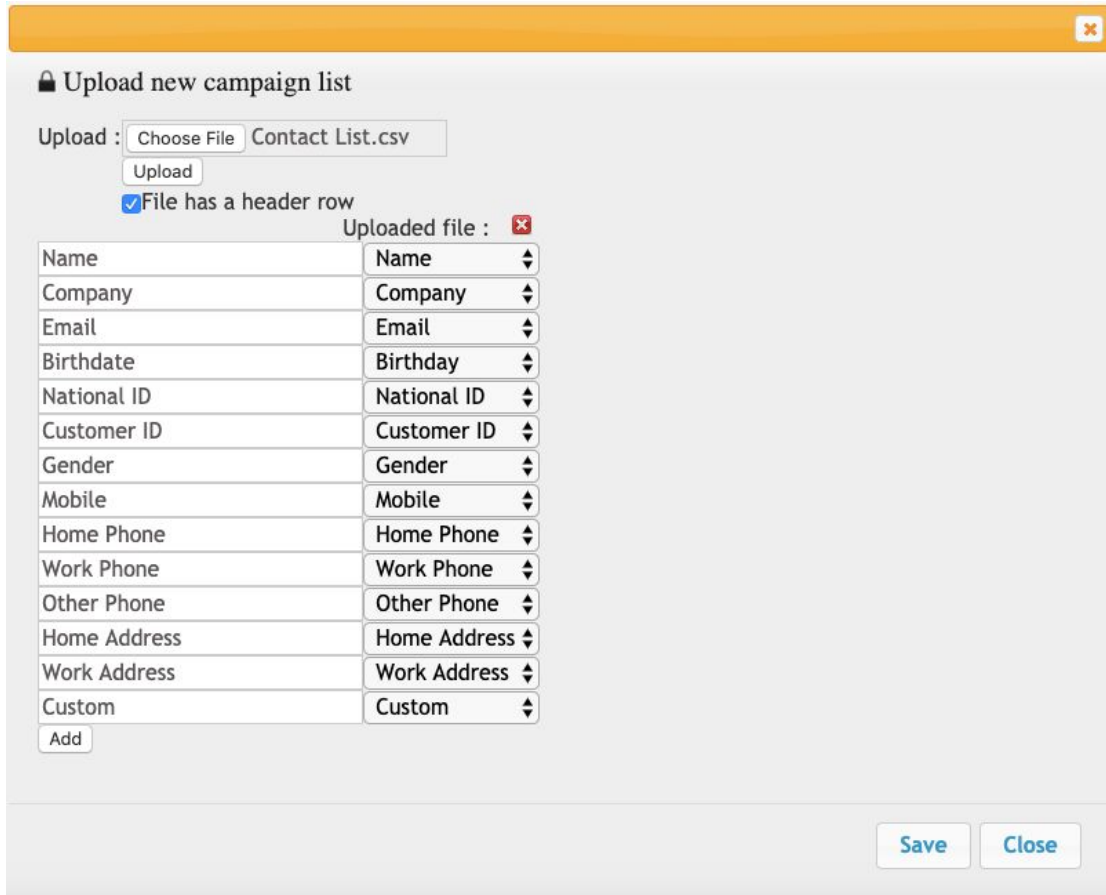
Upload : Contact List.csv

☒ File has a header row

Uploaded file :

Name	
Company	
Email	
Birthdate	
National ID	
Customer ID	
Gender	
Mobile	
Home Phone	
Work Phone	
Other Phone	
Home Address	
Work Address	
Custom	

7. Choose the matched column names from the dropdown lists, as shown below.



Upload new campaign list

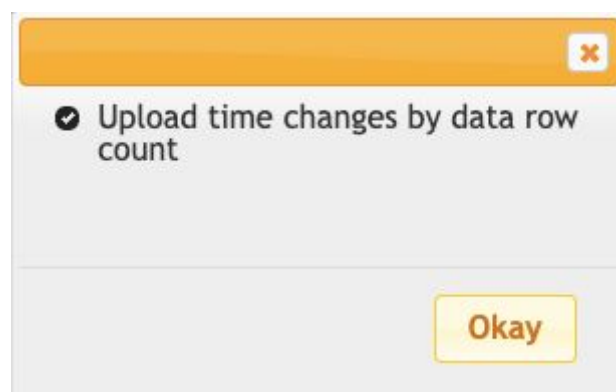
Upload : Contact List.csv

☒ File has a header row

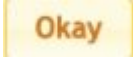
Uploaded file :

Name	Name
Company	Company
Email	Email
Birthdate	Birthday
National ID	National ID
Customer ID	Customer ID
Gender	Gender
Mobile	Mobile
Home Phone	Home Phone
Work Phone	Work Phone
Other Phone	Other Phone
Home Address	Home Address
Work Address	Work Address
Custom	Custom


8. Once the desired selection is made, click the add button, , the following pop-up window will appear as shown below:



☒ Upload time changes by data row count

9. Click the Okay button, , to confirm uploading. Then click the save button,



10. Click the Close button, .

11. Click the refresh button, , to see added contact list.

Searching for a Contact

There are two ways to search for a Contact, as explained below:

Name

1. Click the “Name” input box, type the contact’s name as shown below:

A screenshot of a search interface. On the left, there is a light gray rectangular button with the word "Name" in a dark gray font. To the right of this button is a white text input box with a thin gray border. Inside the input box, the text "John Smith" is entered, followed by a vertical cursor line.

Note: Partial names can be used, when spelled correctly.

Company

1. Click the “Company” input box, type the contact’s company name as shown below:

A screenshot of a search interface. On the left, there is a light gray rectangular button with the word "Company" in a dark gray font. To the right of this button is a white text input box with a thin gray border. Inside the input box, the text "John's Call Center" is entered, followed by a vertical cursor line.


Note: Partial company names can be used, when spelled correctly.

Quality Evaluation Form



Quality Evaluation Forms can be prepared to allow managers the ability to assess past calls of agents. Evaluation forms can be formed as text, paragraph, option button, checkbox, list, and scale. Forms can be used or displayed by a supervisor or those with access.

Creating a Quality Evaluation Form

1. Click the Plus button, , in the top right-hand corner of the Quality Evaluation Form screen, the following screen will appear:



The screenshot shows the 'Add Question' screen in the CallCenter Studio interface. At the top left is the 'CallCenter Studio' logo and a 'Form Name' input field. At the top right are 'Save' and 'Back' buttons. Below the 'Form Name' field is a long text input box. On the right side, there are two tabs: 'Add Question' (active) and 'Edit Question'. Below the tabs are three blue buttons with icons: 'Checkboxes', 'Radio Buttons', and 'Drop Down'.

2. In the top left corner, click the “Form Name” input box, and type the name of the new Quality Evaluation Form, an example is shown below:

Quality Evaluation Form Example

3. There are three views for question answers, click one of the following as described in the list below:

 Checkboxes

The question will be displayed in the checkbox format.

 Radio Buttons

The question will be displayed in the radio button format.

 Drop Down

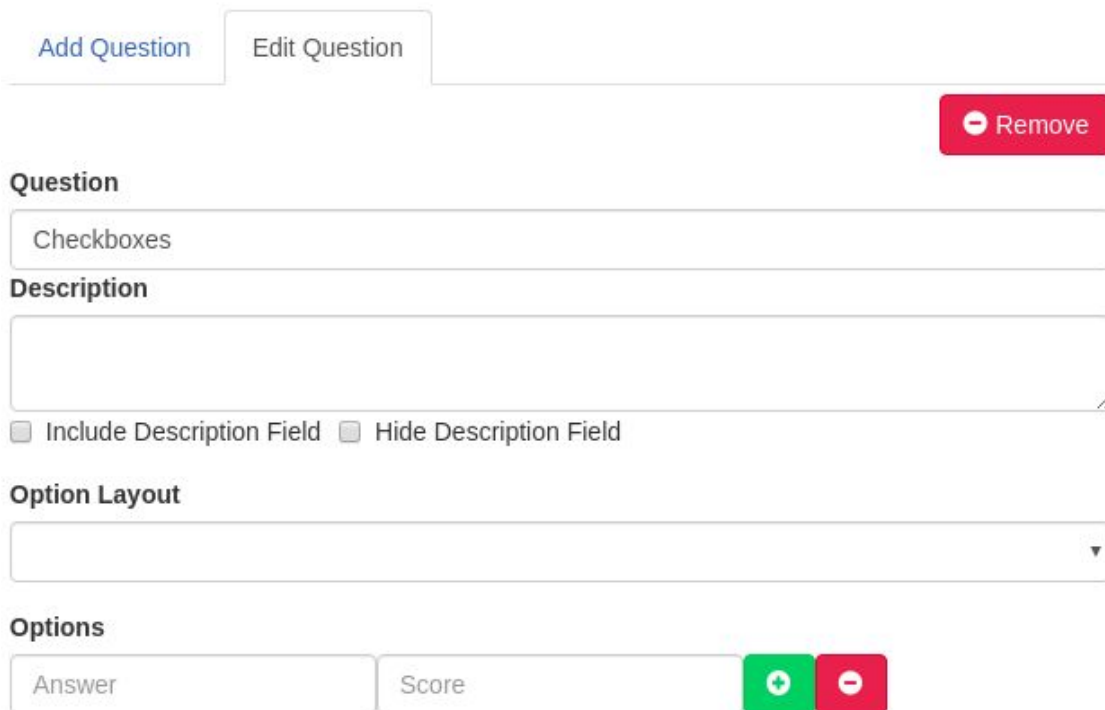
The question will be displayed in a dropdown format.

4. For this example, the “Checkboxes” selection was clicked; the following will appear on the screen, as shown below:



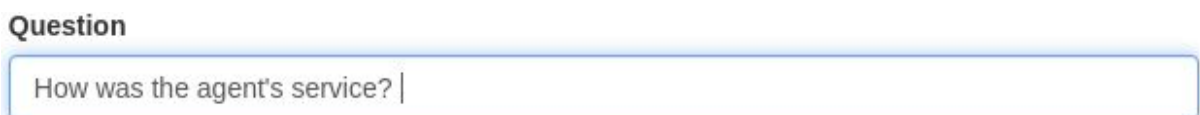
A screenshot of a form titled "Checkboxes" with a single checkbox option.

5. Customize the question, double-click the question desired to edit, the following screen will appear on the right of the screen as shown below:



A screenshot of the "Edit Question" screen. It features a tabbed interface with "Add Question" and "Edit Question" tabs. A "Remove" button is located on the right. The "Question" field contains the text "Checkboxes". Below it is a "Description" field. There are two checkboxes: "Include Description Field" and "Hide Description Field". The "Option Layout" is shown as a dropdown menu. The "Options" section includes an "Answer" field, a "Score" field, and two buttons: a green "+" button and a red "-" button.

6. Click the “Question” input box, type the name of the question. An example is shown below:



A screenshot of the "Question" input box. The text "How was the agent's service? |" is entered into the field.

7. Click the “Description” input box; there are two selection boxes:

☐ Include Description Field

Check this box so that the evaluator can view the description.

☐ Hide Description Field

Check this box, used not to include the description (the evaluator will not be able to view the description if this box is checked)

For this example, the description will be included (Notice “Include Description Field” was clicked) as seen below:

Description

Evaluate the Agent's Score: Good = 10 Bad = 0

☒ Include Description Field ☐ Hide Description Field

8. Click the “Option Layout,” a dropdown menu will appear showing two ways to view the answer options:



9. Click the desired view; an example selection is shown below:



Option LayoutVertical

10. Under Options, in the “Answer” input box, type one answer as seen below:

OptionsGood

11. To the right of the “Answer” input box, click the “Score” input box and assign point-scale to the questions as seen below:

10


12. Add more answers as necessary by clicking the Plus button, , and then repeat steps 10 - 11 (this can be done as often as needed). Also, answers can be deleted by clicking the Minus button, .


13. Add additional questions to the form by selecting the “Add Question” button,

Add Question


, and then repeat steps 3 - 12 as necessary.

Also, questions can be deleted by clicking the question, and then selecting the

“Remove” button, .

14. After completing the form click the save button, , the following confirmation will be displayed in the top right-hand corner of the screen as shown below:




15. After saving the form, click the “Back” button, , the created form can now be seen from the Form Name list as shown below:

<input type="checkbox"/>	Form Name
<input type="checkbox"/>	Quality Evaluation Form Example

Deleting a Quality Evaluation Form

1. Select the checkbox to the left of the Form name, as shown below:


<input type="checkbox"/>	Form Name
<input checked="" type="checkbox"/>	Quality Evaluation Form Example

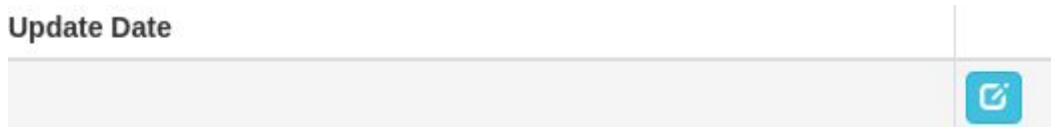
2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:



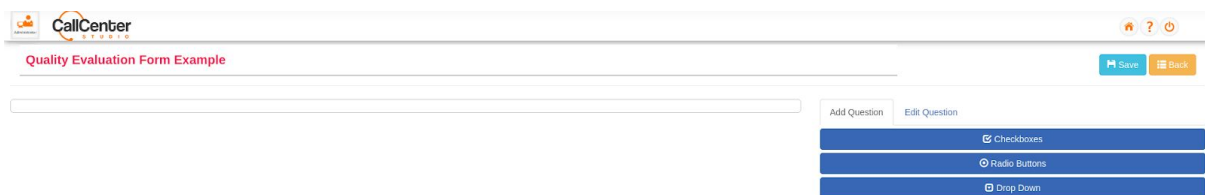
Note: after clicking the Delete button, the form will be deleted forever, no confirmation screen will be displayed.


Editing a Quality Evaluation Form

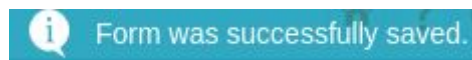
1. Select the Edit button, , located to the right of the update column as shown below:




After clicking the edit button, the following screen will appear:



2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Form** section for assistance)
3. After editing the form, click the save button, , the following confirmation will be displayed in the top right-hand corner of the screen, as shown below:



4. After saving the form, click the “Back” button, , the newly edited form can now be seen from the Form Name list as shown below:

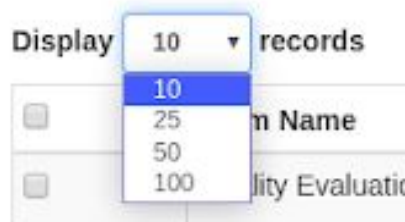
	Form Name
	Quality Evaluation Form Example

Searching for a Quality Evaluation Form

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the “Display records” dropdown box the following will be displayed:



Note: up to 100 forms can be displayed on a single screen. If more than 100 are present,

simply use the Previous button, [Previous](#) , and/or Next button, [Next](#) . These buttons are located in the middle at the bottom of the Form Name list.

Key Word Search


1. Click the “Search:” input box, type part of the form name, insert date, or update date to filter the form list.

Quality Evaluation Layout



*The **Quality Evaluation Layout** is used once a **Quality Evaluation form** has been created under the **Quality Evaluation Form** module (See **Quality Evaluation Form** section for creating a **Quality Evaluation Form**). Using this section, form layouts can be designed, and weights can be given to forms as well. Also, form layouts can be made active or passive.*

Creating a Quality Evaluation Layout

1. Click the Plus button, , in the top right-hand corner of the Quality Evaluation Form screen, the following pop-up window will appear as shown below:

New Layout
×

Layout Name:

Layout Weight Distribution:

☐ Default ☐ By Choice

Quality Evaluation Layout Type:

☐ Default ☐ Accordion

#	Weight	Constant	Form Name
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Quality Evaluation Form Example <input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Sales Skills <input type="text"/>

Save

2. Click the “Layout Name” input box, type the desired layout name as shown below:

Layout Name:

Team One (For queues Customer Service and Sales)

-
3. Under “Weight Layout Distribution” select from the following options explained below:

☒ Default

Default weight distribution: If using multiple forms, default weight distribution will assign 100 % weight to each form.

☐ By Choice

By Choice weight distribution: allows different weights to be assigned to each form. For example: Team One has two layouts: sales service and customer service. Agents from team one are assigned to both of these queues. Management determined the agent’s customer service score should have a higher value placed on it than the sales service score. To do this, the “By Choice” button will need to be selected. (Further directions on assigning specific weights is explained in detail in the following steps).

4. Under “Quality Evaluation Layout Type” select from the following options explained below:

☒ Default

Default evaluation layout type: displays the default form layout under the Quality Control tab (Determines how the supervisor will see the forms).

☐ Accordion

Accordion evaluation layout type: displays the accordion form layout under the Quality Control tab (Determines how the supervisor will see the forms).

Default View (Under Quality Control Tab), seen while evaluating an agent:

Customer Service

How was the customer service?

☐ Good

☐ Bad

Sales Service

How is the agent's sales skills?

☐ Good

☐ Bad

Accordion View (Under Quality Control Tab), seen while evaluating an agent:

Customer Service

Sales Service

Accordion View after clicking each form (Under Quality Control Tab), seen while evaluating an agent:

Customer Service
How was the customer service?
☐ Good
☐ Bad

Sales Service
How is the agent's sales skills?
☐ Good
☐ Bad

5. Under the “#” there is a checkbox for each form. In this example we have created two forms, each form has a checkbox under the “#” (Click the checkbox if you want the form to be visible when the supervisor is in the Quality Control Tab) an image of the checkboxes is shown below:



6. Under “Weight,” there is an input box for each form. In this example, we have created two forms: Customer Service and Sales Service. Management wants Customer Service to hold a higher weight in the agent evaluation than Sales Service to do this; we can assign a higher weight to the Customer Service form as demonstrated below:

#	Weight	Constant	Form Name
<input checked="" type="checkbox"/>	<input type="text" value="70"/>	<input checked="" type="checkbox"/>	Customer Service
<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input checked="" type="checkbox"/>	Sales Service

7. Under Constant, there is a checkbox for each form. The checkboxes, if selected, make the forms mandatory. In this example, since Team One may be using different queues, the Constant checkboxes have not been selected so that the supervisor can fill out the evaluation form that pertains to the specific call an example is shown below:

#	Weight	Constant	Form Name	
<input checked="" type="checkbox"/>	<input type="text" value="70"/>	<input type="checkbox"/>	Customer Service	<input type="text" value="Customer Service"/>
<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input type="checkbox"/>	Sales Service	<input type="text" value="Sales Service"/>



8. If using multiple forms, click the dropdown menu to the right of the form name match the form name with the corresponding dropdown selection as seen below:



Form Name

Customer Service	<input type="text" value="Customer Service"/>
Sales Service	<input type="text" value="Sales Service"/>

9. Click the Save button, **Save**, the created form layout will be visible under the Form Name list shown below:


<input type="checkbox"/>	Form Name
<input type="checkbox"/>	Team One (For queues Customer Service and Sales)


10. When a form is first saved, the status of the form by default is passive, meaning the supervisor under the quality control screen will not be able to see the form to evaluate the agent. Click the Passive button, , to the right of “Update Date.” The Passive button will change to the Active Button, , as shown below:

Update Date	
2020-04-16 19:50:41	 

The form layout is set, and the supervisor can begin to review agents.

Editing a Quality Evaluation Form

1. Select the Edit button, , located to the right of the update column as seen below:

Update Date


After clicking the edit button, the following pop-up window will appear:

New Layout
×

Layout Name:

Team One (For queues Customer Service and Sales)

Layout Weight Distribution:

☒ Default
☐ By Choice


Quality Evaluation Layout Type:

☐ Default
☒ Accordion



#	Weight	Constant	Form Name
<input checked="" type="checkbox"/>	<div>70</div>	<input type="checkbox"/>	Customer Service
<input checked="" type="checkbox"/>	<div>30</div>	<input type="checkbox"/>	Sales Service



Save

2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Layout** section for assistance)

3. Click the Save button, , the created form layout will be visible under the Form Name list shown below:

<input type="checkbox"/>	Form Name
<input type="checkbox"/>	Team One (For queues Customer Service and Sales)

4. Click the Passive button, , to the right of “Update Date.” The Passive button will change to the Active Button, , as shown below:


Update Date	
2020-04-16 19:50:41	 

The edited form layout is set, and the supervisor can begin to review agents.

Deleting a Quality Evaluation Layout

1. Select the checkbox to the left of the form's name, as shown below:

<input type="checkbox"/>	Form Name
<input checked="" type="checkbox"/>	Team One (For queues Customer Service and Sales)

2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:



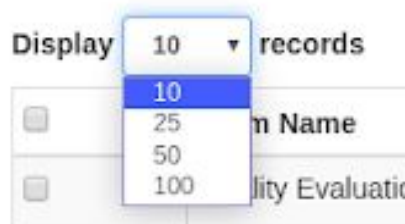
Note: after clicking the Delete button, the form layout will be deleted forever, no confirmation screen will be displayed.

Searching for a Quality Evaluation Layout

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the “Display records” dropdown box the following will be displayed:



Note: up to 100 forms can be displayed on a single screen. If more than 100 are present,

simply use the Previous button, [Previous](#), and/or Next button, [Next](#). These buttons are located in the middle at the bottom of the Form Name list.

Key Word Search


1. Click the “Search:” input box, type part of the form layout name, insert date, or update date to filter the form list automatically.

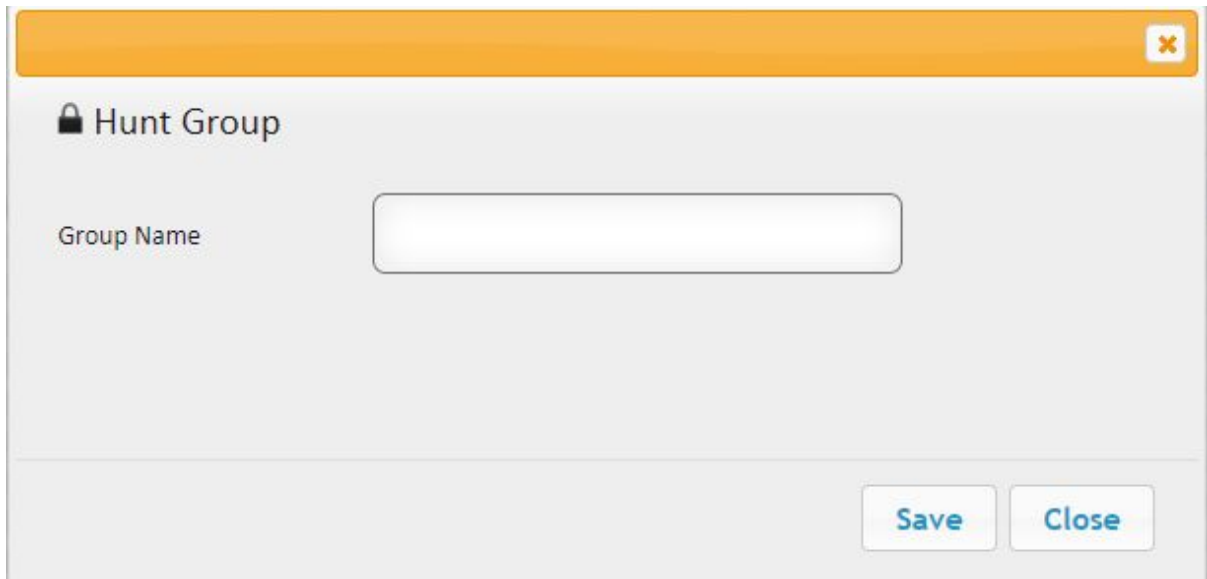
Hunt Groups



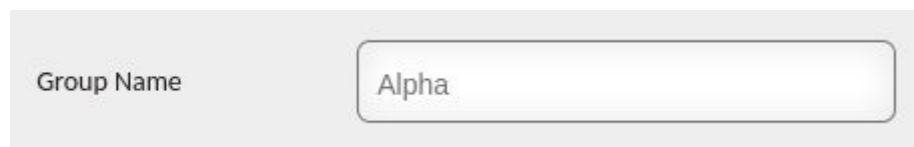
A hunt group is a feature for the IP phone system that distributes calls from a single phone number to a group of numbers in the company. The hunt group is used in such a way that when a customer calls the company's number, the hunt group will connect the call to a group of numbers.

Creating a Hunt Group


1. Press the new button, , the pop-up window will appear as shown below:

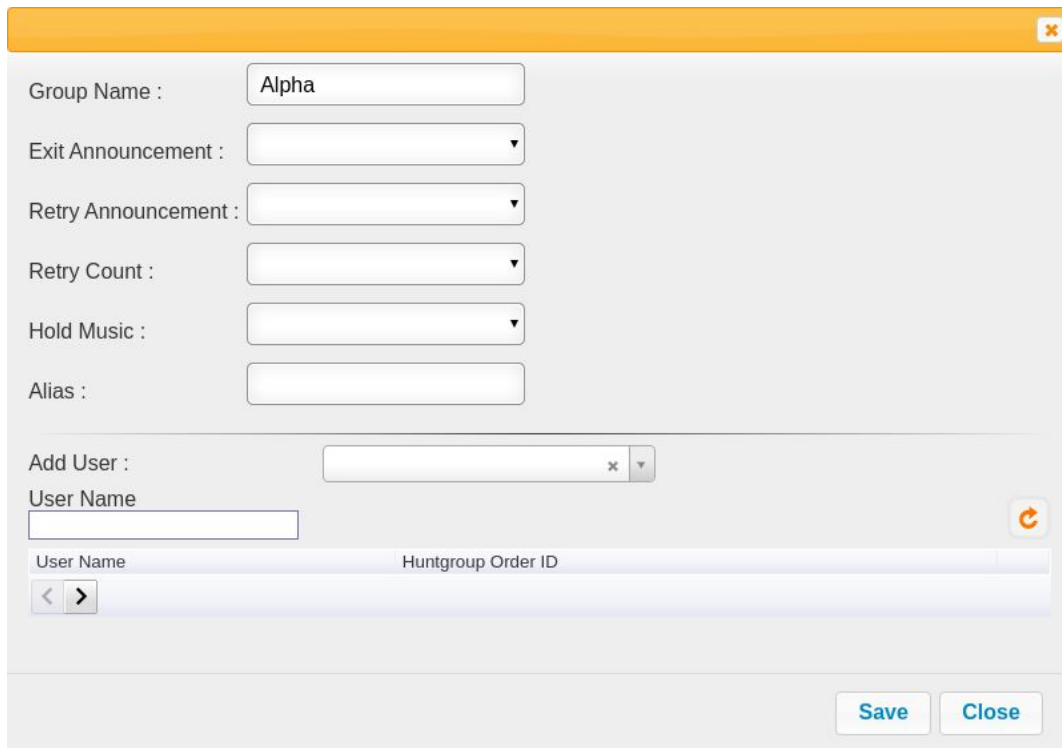
A screenshot of a web-based pop-up window titled "Hunt Group" with a lock icon. The window has a light gray background and a white border. At the top, there is a yellow header bar with a close button (X) in the top right corner. Below the header, the title "Hunt Group" is displayed. Underneath, the label "Group Name" is followed by a large, empty text input field. At the bottom right of the window, there are two buttons: "Save" and "Close", both with blue text and light blue borders.

2. Click the group name input box, type the desired Hunt group name, an example is shown below:

A close-up screenshot of the "Group Name" input field from the previous image. The text "Alpha" has been typed into the input box, which now has a light gray border. The label "Group Name" is to the left of the input field.

Note: the hunt group name can be edited at any time.

3. Click the save button, , the following pop-up window will appear:



A pop-up window with an orange header bar and a close button in the top right corner. The form contains the following fields:

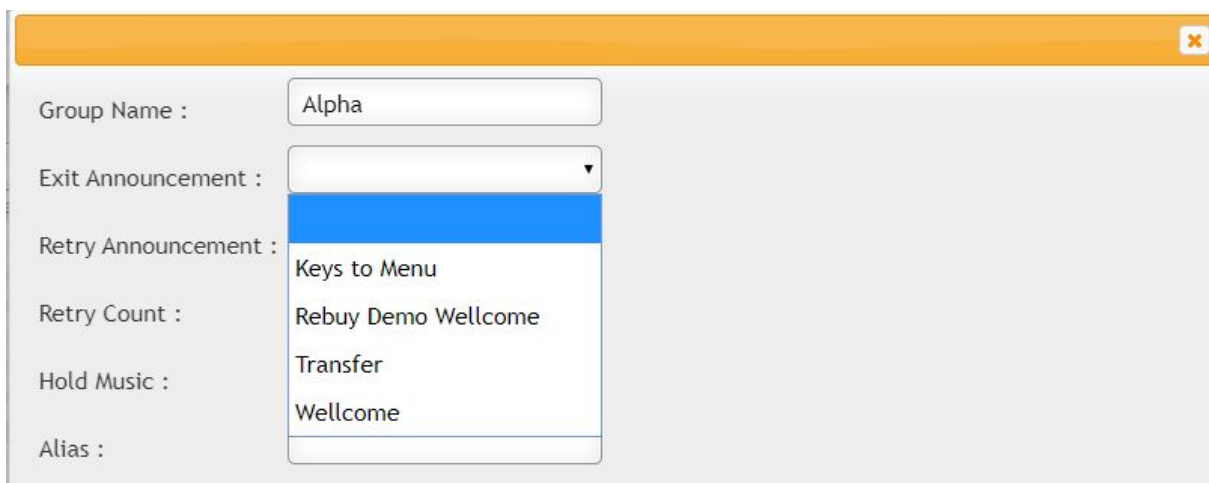
- Group Name :
- Exit Announcement :
- Retry Announcement :
- Retry Count :
- Hold Music :
- Alias :

Below these fields is a section for adding users:

- Add User :
- User Name :
- User Name :
- Huntgroup Order ID :

At the bottom right are two buttons: **Save** and **Close**.

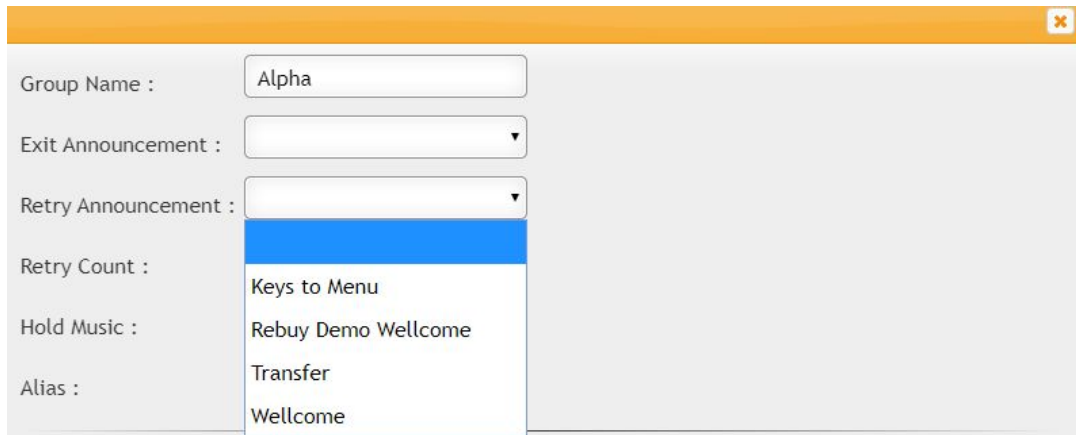
4. Click the announcement input box a dropdown list will appear with created announcements, select the desired announcement (See the Announcement Section for creating a new announcement)



The same pop-up window as in the previous image, but with the 'Exit Announcement' dropdown menu open. The dropdown list contains the following items:

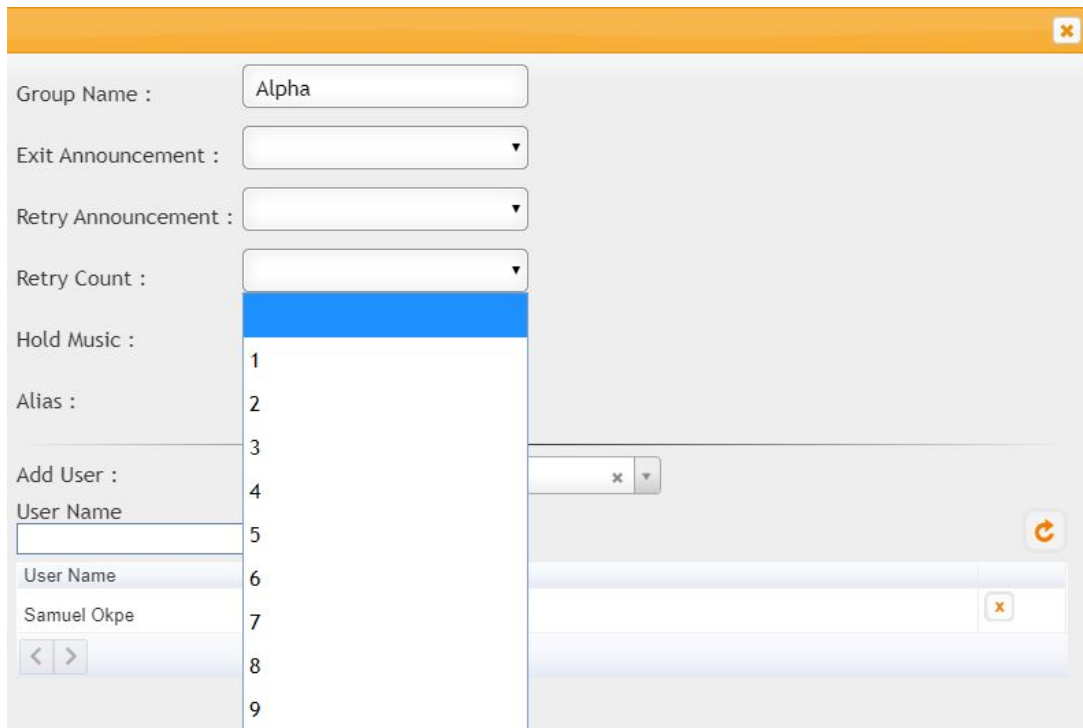
- Keys to Menu
- Rebuy Demo Wellcome
- Transfer
- Wellcome

5. Click the retry announcement input box a dropdown list will appear with created announcements, select the desired announcement (See the Announcement Section for creating a new announcement)



The screenshot shows a configuration window for a hunt group named "Alpha". The "Retry Announcement" dropdown menu is open, displaying a list of available announcements: "Keys to Menu", "Rebuy Demo Wellcome", "Transfer", and "Wellcome". The "Retry Count" field is currently empty.

6. Retry Count: This is the maximum number of attempts it takes to reconnect the caller to the hunt group. It ranges from 1-9 as shown below:




The screenshot shows the same configuration window for the "Alpha" hunt group. The "Retry Count" dropdown menu is open, displaying a list of numbers from 1 to 9. The "Add User" section is visible below the dropdown, showing a "User Name" field with the text "Samuel Okpe" and a "User Name" label.


7. Select “Hold Music” if desired: This feature keeps the caller occupied while in the queue. (Hold music can be added upon request to the Call Center Studio Team, the sound file must be 16bit mono 8000hz .wav format).



8. In the “Alias” input box type an alias if desired. (Hunt groups are sets of endpoints that share an alias or aliases. Alias makes it possible for registered endpoints to join or leave the hunt group.)

9. Add User: Users are added to the hunt group by pressing the  button on the add user column. The user name search button makes it easy for users to be found. Similarly, the hunt group order ID for users can be changed by using the downward and upward facing arrows.

User Name	Huntgroup Order ID	
Austin	1	



Note: A user can be removed from the hunt group by clicking on the delete button, , located to the far right of the User's name.


demo.callcenterstudio.com says

Cole Melendez user will be removed from group. Do you want to continue?


Cancel

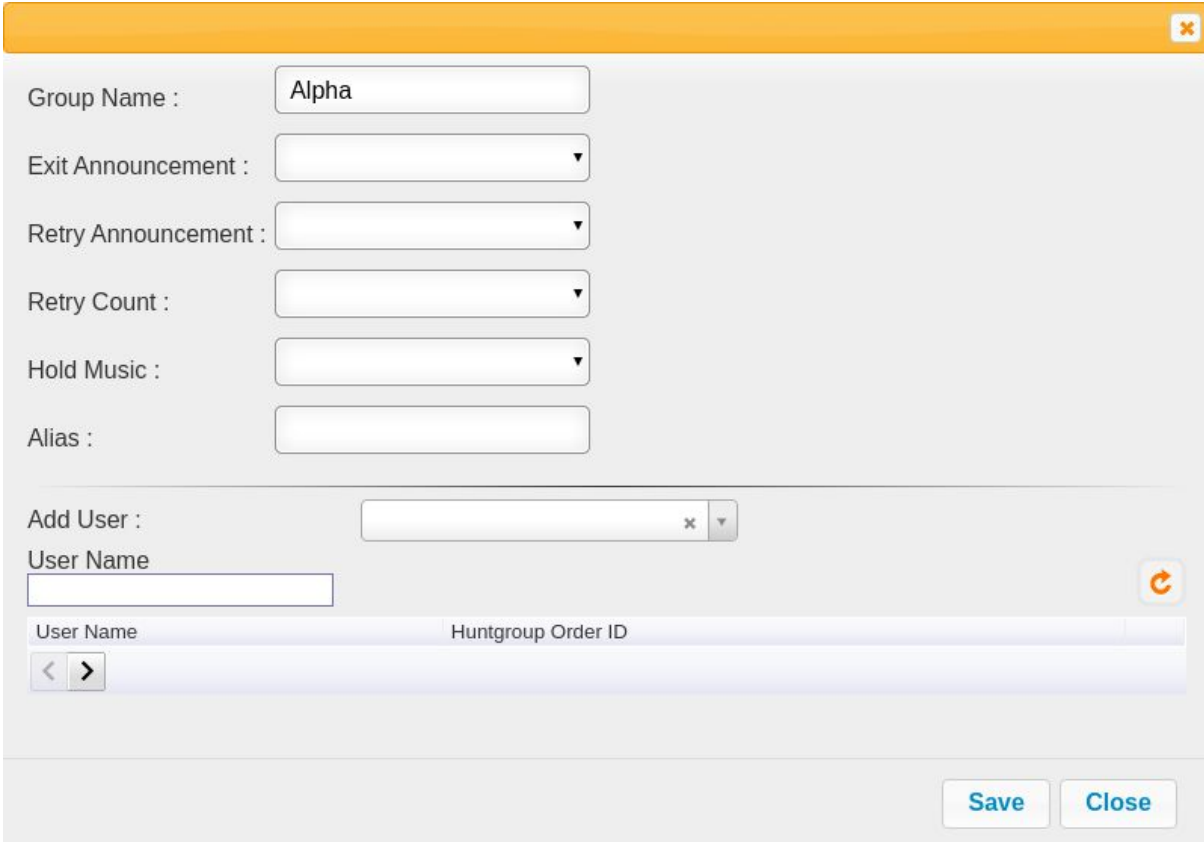
OK

- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

10. Click the save button, .

Editing a Hunt Group



1. To edit a hunt group, click the edit button, , located on the far right after the “Update Date” column. The following pop-up window will appear:



The pop-up window has an orange title bar with a close button (X) in the top right corner. The main area is light gray and contains the following fields:


- Group Name :
- Exit Announcement :
- Retry Announcement :
- Retry Count :
- Hold Music :
- Alias :

Below these fields is a section for adding users:



- Add User : 
- User Name
- 

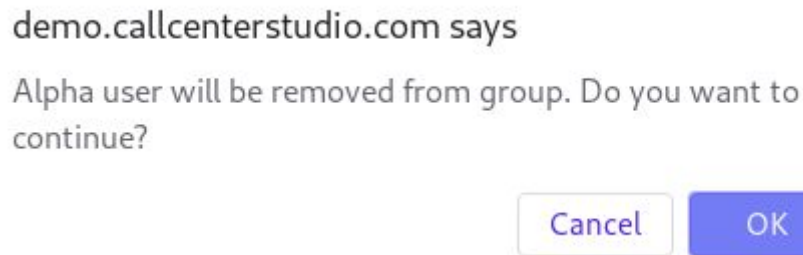
At the bottom of the form is a table with two columns: "User Name" and "Huntgroup Order ID". The table has a header row and one data row. Navigation arrows (< and >) are located at the bottom left of the table.




At the bottom right of the window are two buttons: "Save" and "Close".

2. Make necessary changes
3. Click the save button, .

Deleting a Hunt Group

1. Click the delete button, , located to the right of the edit button, . The following pop-up window will appear:



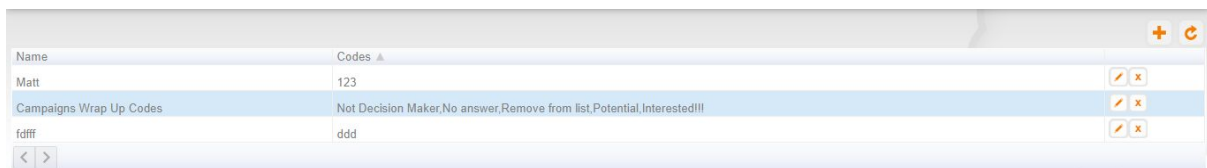
- Selecting the cancel button, , will cancel the deletion.
 - Selecting the OK button, , will confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

The screen will reload and the deleted hunt group will not be shown.

Wrapup Codes



Wrapup codes are a quick way to summarise important information in an interaction.

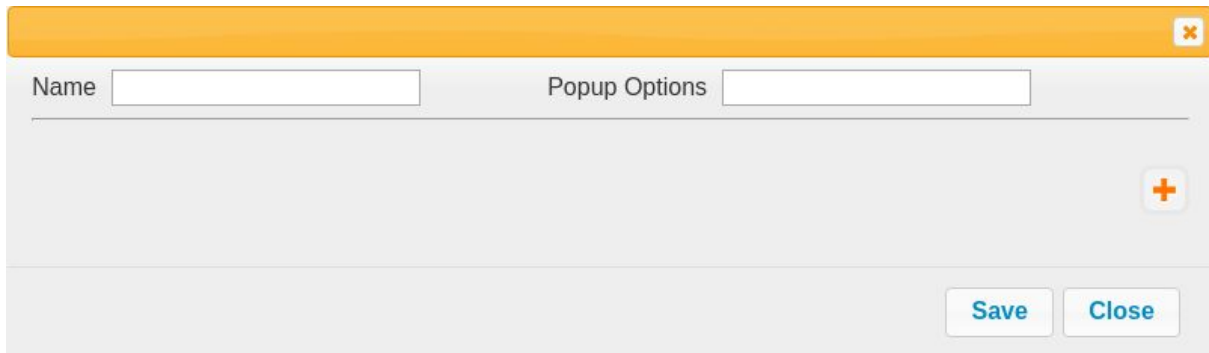
The screenshot shows a software interface for managing wrapup codes. It has a table with two columns: "Name" and "Codes". The "Codes" column has a small upward arrow icon next to the header. There are three rows of data. The first row has "Matt" in the Name column and "123" in the Codes column. The second row has "Campaigns Wrap Up Codes" in the Name column and "Not Decision Maker, No answer, Remove from list, Potential, Interested!!!" in the Codes column. The third row has "fdffr" in the Name column and "ddd" in the Codes column. Each row has a small edit icon (pencil) and a delete icon (X) to the right of the code field. At the bottom left of the table, there are navigation arrows: a left arrow and a right arrow. At the top right of the table, there are a plus sign and a refresh/circular arrow icon.

Name	Codes ▲
Matt	123
Campaigns Wrap Up Codes	Not Decision Maker, No answer, Remove from list, Potential, Interested!!!
fdffr	ddd

This step is used to designate topics covered on agent calls. These codes can be used to quickly access reports. Calls logs can be accessed according to closing code results and reports can be taken. *Note: Wrapup codes are used only for outgoing calls not part of a campaign.*

Creating a Wrapup Code

1. Click the new  button, the following pop-up window will appear:



A pop-up window with an orange header bar containing a close button (X). Below the header, there are two input fields: 'Name' and 'Popup Options'. The 'Name' field is currently empty, and the 'Popup Options' field is also empty. To the right of the 'Name' field, there is a plus icon (+). At the bottom right of the window, there are two buttons: 'Save' and 'Close'.


2. Click the Name input box, type the desired wrapup code an example is shown below:



A close-up of the 'Name' input box. The text 'Deal' is entered into the box.


3. Click the Popup Options input box, (this section is used to change the size of the Wrapup code pop-up option window) input the following formula and customize as desired:

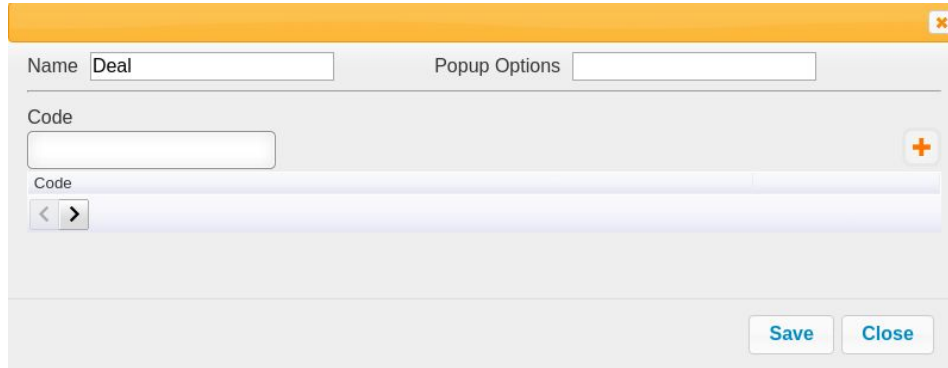
`width=1500,height=1000,screenX=0,left=0,screenY=0,top=0`

4. Click the save button, . The new wrapup code will be displayed in the wrapup code list as shown below:





A table with two columns: 'Name' and 'Deal'. The 'Name' column contains the text 'Deal'.

5. Wrapup codes can be accessed using the edit button  of the desired Wrapup code group name. The screen is shown below:



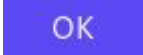
The screenshot shows a window titled "Wrapup Code Edit" with a yellow header bar. It contains two input fields: "Name" with the value "Deal" and "Popup Options" which is empty. Below these is a "Code" section with a text input field and a "+" button to its right. Underneath the text input is a list box with a scroll bar and a "< >" button on the left. At the bottom right are "Save" and "Close" buttons.

6. To add a wrapup code, click the “Add” button, , the following pop-up window will appear:





The screenshot shows a small dialog box with the text "demo.callcenterstudio.com says" at the top. Below it is the prompt "Enter wrapup code" followed by a text input field. At the bottom are "Cancel" and "OK" buttons.

7. In the “Enter wrapup code” input box, type the desired wrapup code name.

8. Click the “OK” button, . An example wrapup code is shown below:





- Use the *edit button*, , to the right of the desired wrapup code to modify the code’s name.
- Use the *delete button*, , to delete the wrapup code. The following pop-up window will be displayed:

demo.callcenterstudio.com says


Are you sure?

Cancel


OK

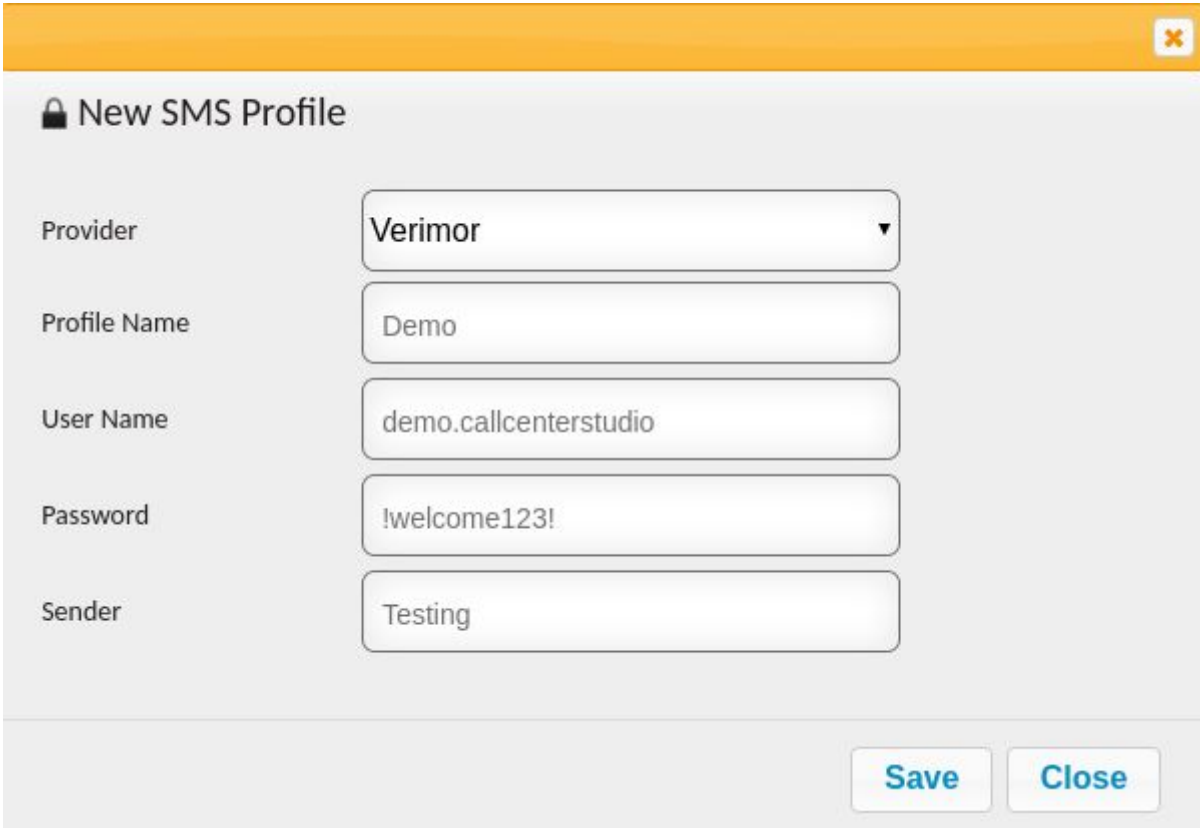
- Selecting the *cancel button*, , will cancel the deletion.
- Selecting the *OK button*, , will confirm the deletion.

9. Multiple wrapup codes can be created under one wrapup group name. For example:
Lead, Denied, No answer, are sample wrapup codes that could be in the same wrapup code group. To create multiple wrapup codes, repeat steps 6-8.


10. Click the save button, .

Editing a Wrapup Code



1. Click the edit  button on the far right of the column of the desired wrapup code group name. The following pop-up window will appear:

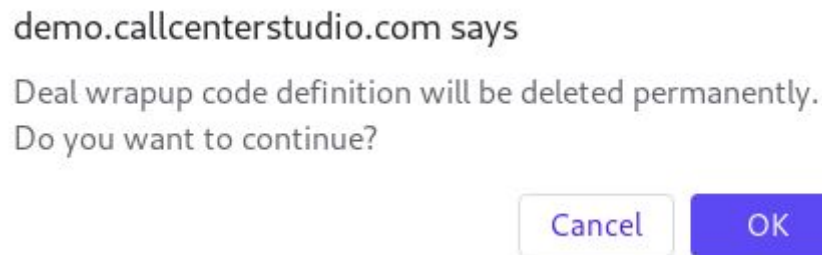





A pop-up window titled "New SMS Profile" with a close button in the top right corner. The window contains five input fields with labels on the left: "Provider" (a dropdown menu showing "Verimor"), "Profile Name" (text input with "Demo"), "User Name" (text input with "demo.callcenterstudio"), "Password" (text input with "!welcome123!"), and "Sender" (text input with "Testing"). At the bottom right of the window are two buttons: "Save" and "Close".

2. Make the necessary changes
3. Click the save button, .

Deleting a Wrapup Code

1. Click the delete button, , located to the right of the edit button, . The following pop-up window will appear:



- Selecting the cancel button, , will cancel the deletion.
 - Selecting the OK button, , will confirm the deletion.
2. Confirm the deletion by clicking the OK button, .


The screen will reload and the deleted wrapup code will not be shown.

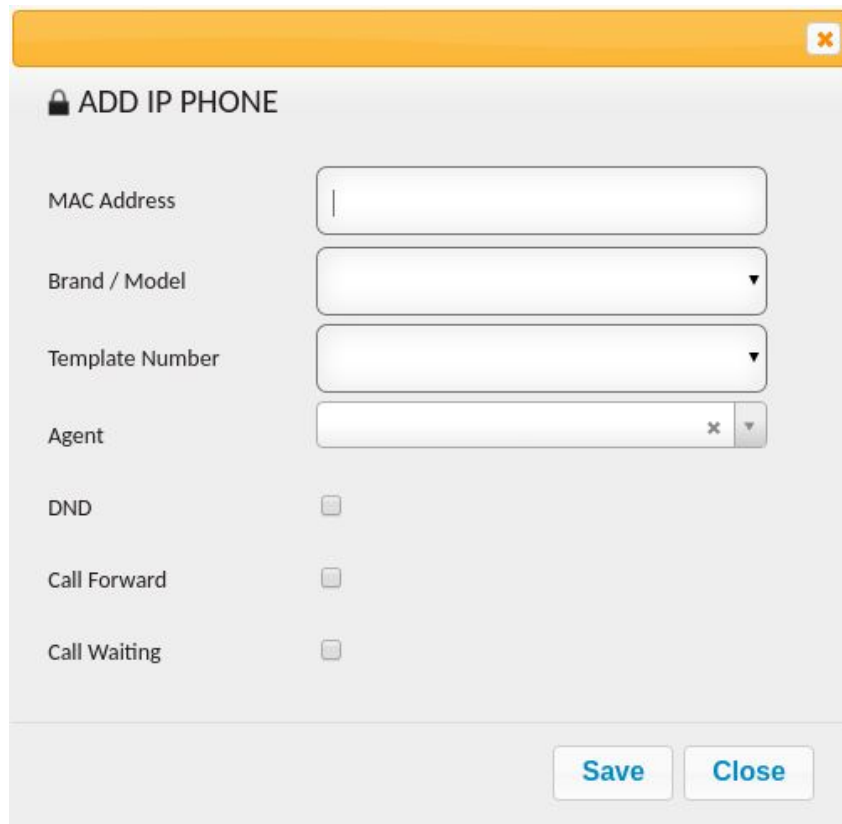
IP Phone



The IP phone tab is used to set up IP phones for agents to use in coordination with Call Center Studio's software.

Adding an IP Phone

1. Click the new button, , in the top right corner the following pop-up screen will appear as shown below:



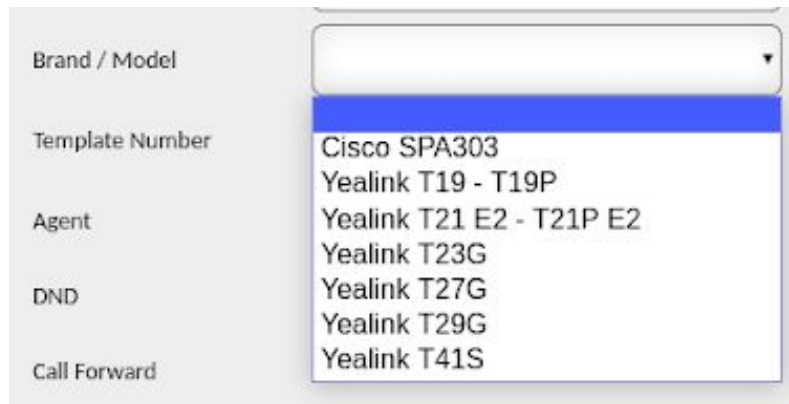
The screenshot shows a pop-up window titled "ADD IP PHONE" with a close button in the top right corner. The form contains the following fields and options:

- MAC Address: A text input field.
- Brand / Model: A dropdown menu.
- Template Number: A dropdown menu.
- Agent: A dropdown menu with a search icon and a close button.
- DND: A checkbox.
- Call Forward: A checkbox.
- Call Waiting: A checkbox.

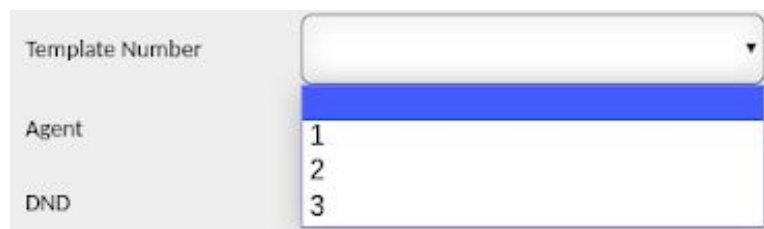
At the bottom right, there are two buttons: "Save" and "Close".

2. In the "MAC Address" input box, type the MAC address of the desired IP Phone.
(Normally a 12 digit alphanumeric string located on the bottom of the IP phone or in the settings on the phone.)

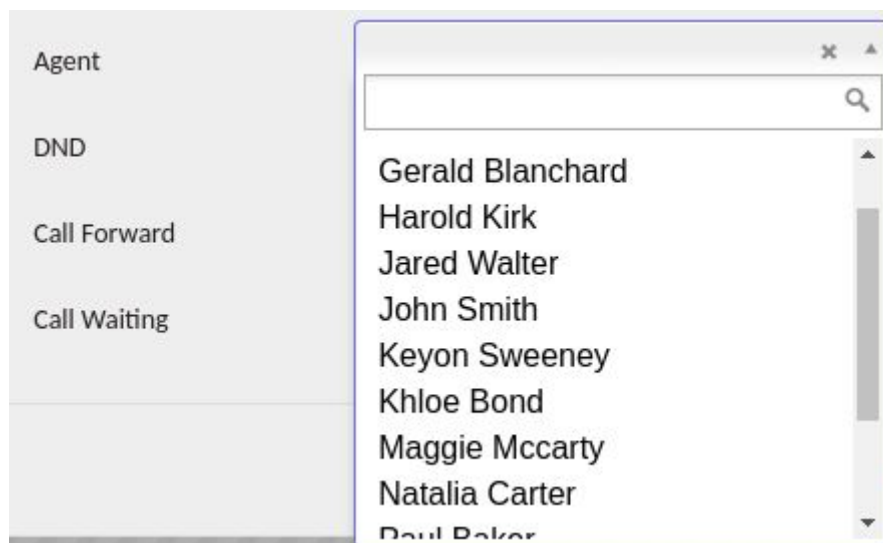
3. Click the “Brand / Model” dropdown box, the following brands and models are currently compatible with Call Center Studio’s software:



4. Click the “Template Number” dropdown box, chose from the following template numbers:



5. Click the “Agent” dropdown box, select the desired agent for the IP phone. An example is shown below:

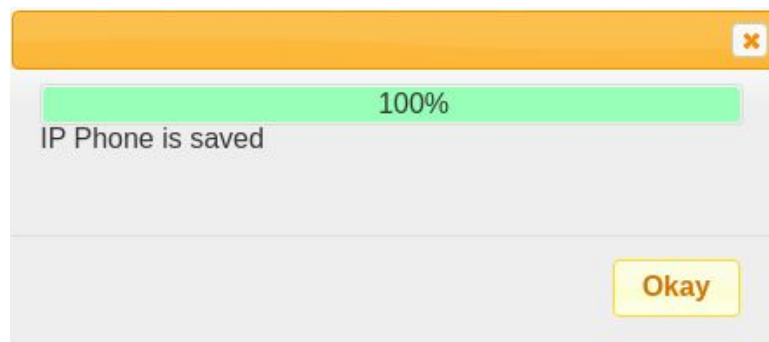


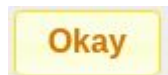
6. Below the “Agent” dropdown box, the following checkboxes are shown:

DND	<input type="checkbox"/>
Call Forward	<input type="checkbox"/>
Call Waiting	<input type="checkbox"/>


DND	When checked, the “Do Not Disturb” feature can be used on the IP phone.
Call Forward	When checked, the “Call Forward” feature can be used on the IP phone.
Call Waiting	When checked, the “Call Waiting” feature can be used on the IP phone.

7. Click the save button, . The following pop-up window will appear:



8. Click the okay button, .

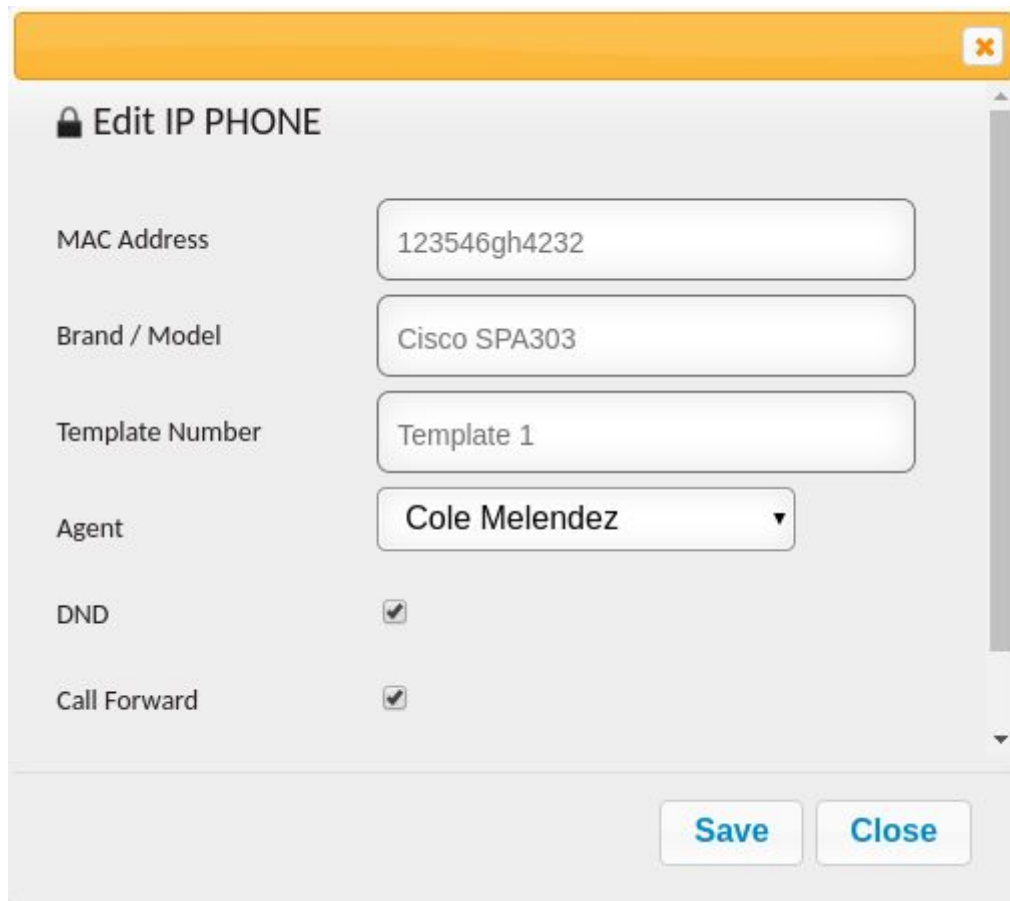
Editing an IP Phone

1. To edit an IP Phone, click the edit button, , located on the far right of the IP MAC address after the “Template Number” column as shown below:



A screenshot of a table row. The first cell contains the text 'Call Limit' followed by a small upward-pointing triangle. The second cell contains the number '0'. To the right of the number '0' are two small icons: an edit icon (a pencil) and a delete icon (an 'x').



After clicking the edit button, the IP Phone window will appear as shown:



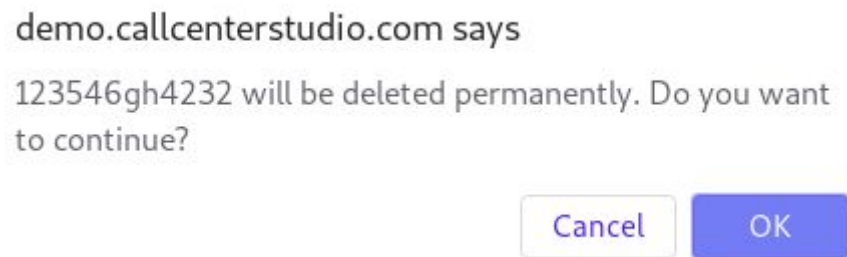
A screenshot of a window titled 'Edit IP PHONE'. The window has a yellow header bar with a close button (an 'x' icon). Below the header, there is a lock icon followed by the title 'Edit IP PHONE'. The main area contains several fields: 'MAC Address' with the value '123546gh4232', 'Brand / Model' with the value 'Cisco SPA303', 'Template Number' with the value 'Template 1', and 'Agent' with a dropdown menu showing 'Cole Melendez'. Below these are two checkboxes: 'DND' and 'Call Forward', both of which are checked. At the bottom right of the window are two buttons: 'Save' and 'Close'.


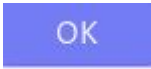
2. Make changes as desired.

Deleting an IP Phone

1. From the IP Phone list, click the delete button, , to the right of the edit button, .

When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted IP Phone will not be shown.

Searching for an IP Phone

There are three ways to search for an IP Phone.

- MAC Address
- Brand / Model
- User

MAC Address

1. Click the “MAC Address” input box, type the MAC Address, the input box is shown below:

A screenshot of a web interface showing a search input area. On the left, the text "MAC Address" is displayed in a light gray font. To its right is a white rectangular input box with a thin gray border.

Note: Partial names can be used, when spelled correctly.

Brand / Model

1. Click the “Brand / Model” input box, type the Brand / Model, the input box is shown below:

A screenshot of a web interface showing a search input area. On the left, the text "Brand / Model" is displayed in a light gray font. To its right is a white rectangular input box with a thin gray border.

Note: Partial names can be used, when spelled correctly.

User

1. Click the “User” input box, type the user’s name, the input box is shown below:

A screenshot of a user input interface. It consists of a light gray rectangular container. On the left side of the container, the word "User" is displayed in a gray font. To the right of the text is a white rectangular input field with a thin gray border and rounded corners.


Note: Partial names can be used, when spelled correctly.

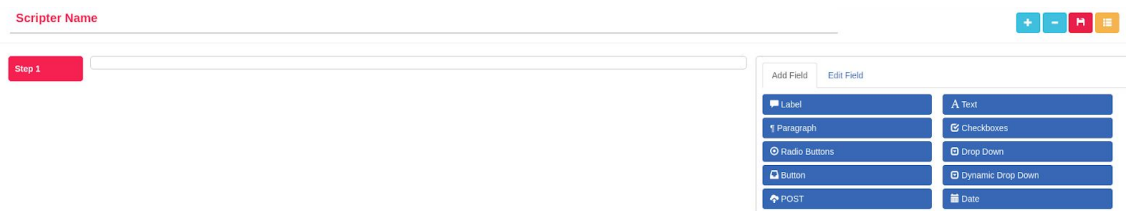
Scripter



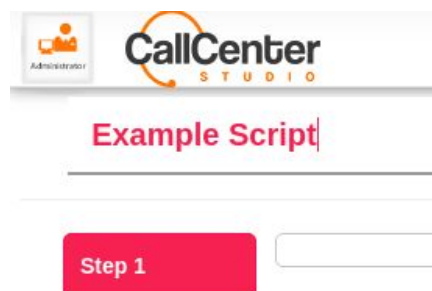
Used to create, edit, and execute agent outbound scripts.


Adding a Scripter

1. Click the Plus button, , in the top right-hand corner of the Scripter screen, the following pop-up window will appear:



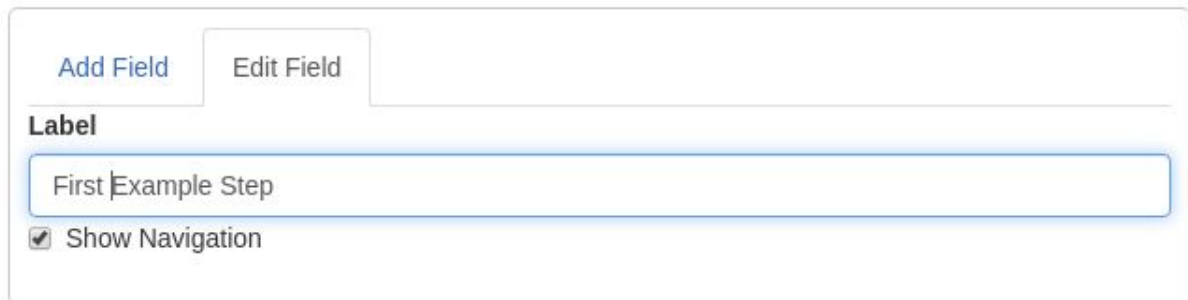
2. Click the “Scripter Name” input box (in red) and type the desired script name; an example is shown below:



3. Click the “Step 1” button, , the following window will appear on the right-hand side of the screen:

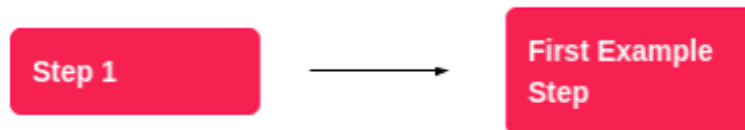



- Click the “Label” input box, type the desired name for step 1, an example is shown below:

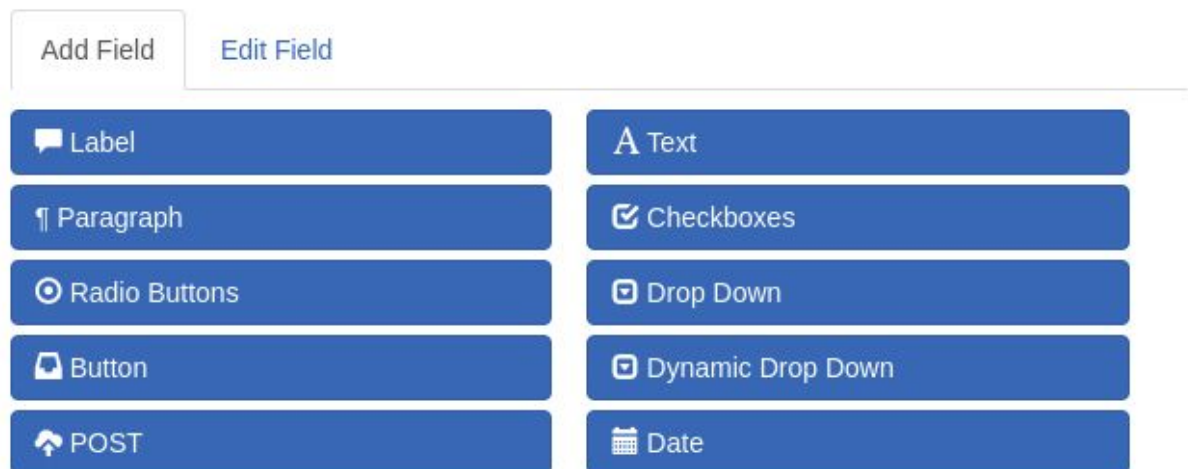


The screenshot shows a window with two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. Below the tabs, the word 'Label' is displayed. A text input box contains the text 'First Example Step'. Below the input box, there is a checkbox labeled 'Show Navigation' which is checked.











Note the following transition will also occur on the left-hand side of the Scripter screen:



- After the desired step name is assigned, click “Add Field,” . The following window will appear:



The screenshot shows a window with two tabs: 'Add Field' and 'Edit Field'. The 'Add Field' tab is active. Below the tabs, there is a grid of 10 blue buttons, each with an icon and a label. The buttons are arranged in two columns of five.

 Label	 Text
 Paragraph	 Checkboxes
 Radio Buttons	 Drop Down
 Button	 Dynamic Drop Down
 POST	 Date

Adding label Field

1. Click the “Label” button, , the following items will appear on the screen:

Example Script



The image shows a window titled "First Example Step" on the left. To its right is a single step in a script, represented by a dashed rectangular box containing the text "Label".

2. Double click the “Label” window once clicked it will become shaded as shown below:



The image shows a single step in a script, represented by a dashed rectangular box containing the text "Label". The box is shaded gray, indicating it is selected.

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



The image shows the "Edit Field" window for the "Label" step. It has two tabs at the top: "Add Field" and "Edit Field". The "Edit Field" tab is active. On the right side of the window is a red "Remove" button with a minus icon. Below the tabs, the word "Label" is displayed. Underneath is a text input box containing the text "Label". At the bottom, there are three checkboxes: "Required", "Show Summary", and "Show in Report", all of which are currently unchecked.

3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.


Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

Example Label


Required

Show Summary

Show in Report

5. Click the save button,  .

Adding Paragraph Field

1. Click the “Paragraph” button,  , the following items will appear on the screen:

Example Script



First Example Step

Paragraph

A text input field with a dashed border and a small icon in the bottom right corner.

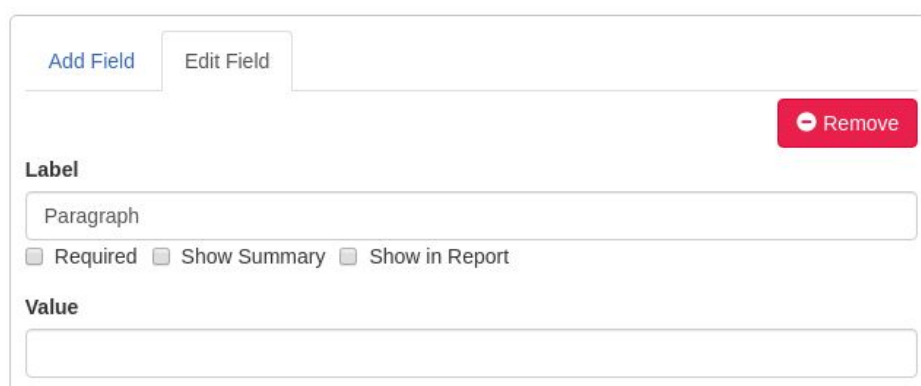
2. Double click the “Paragraph” window once clicked it will become shaded as shown below:



Paragraph

A text input field with a solid gray header bar and a dashed border.

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



Add Field Edit Field

Remove

Label

Paragraph

☐ Required ☐ Show Summary ☐ Show in Report

Value

A text input field.

3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report


The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.


Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:



5. Click the “Value” input box, type as desired.

6. Click the save button, .

Adding Radio Buttons Field

1. Click the “Radio Buttons” button,  , the following items will appear on the screen:

Example Script



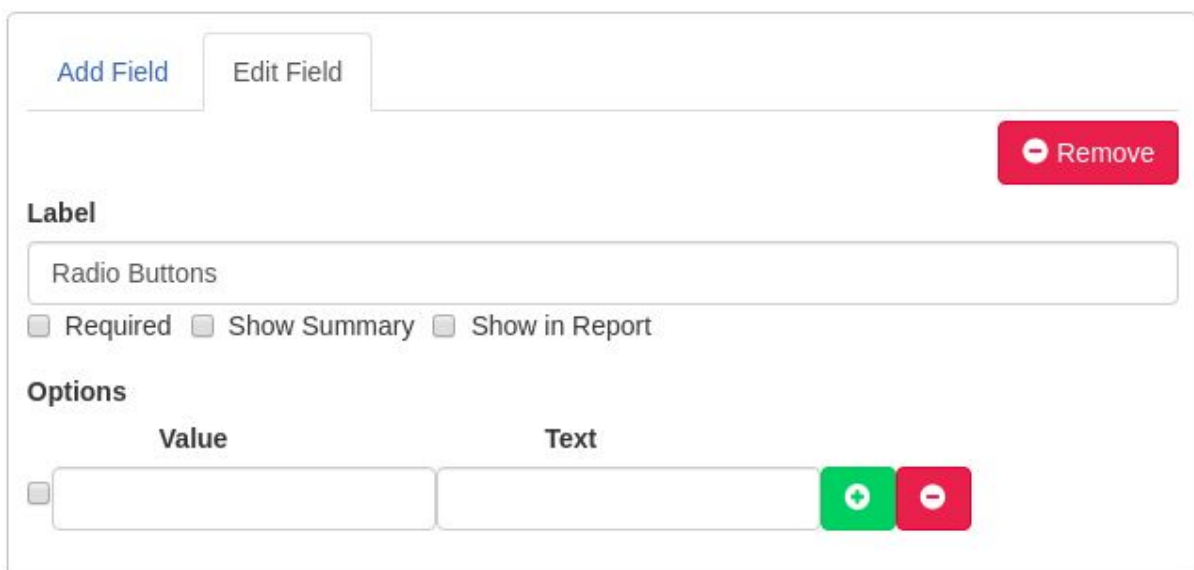
The screenshot shows a window titled 'First Example Step' with a red header. Inside, there is a dashed box containing the text 'Radio Buttons' and a small radio button icon.

2. Double click the “Radio Buttons” window once clicked it will become shaded as shown below:



The screenshot shows a shaded rectangular area with a dashed border. Inside, the text 'Radio Buttons' is visible along with a small radio button icon.

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



The screenshot shows the 'Edit Field' configuration window. It has two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. At the top right is a red 'Remove' button. Below is a 'Label' section with an input box containing 'Radio Buttons'. Underneath are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. Below that is an 'Options' section with a table. The table has two columns: 'Value' and 'Text'. There is one row with an empty input box under 'Value' and an empty input box under 'Text'. To the right of the 'Text' input box are two buttons: a green '+' button and a red '-' button.

3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: When the checkboxes are selected, they can be seen in red under the field details as shown below:



5. Click the “Value” input box, type as desired.
6. Click the “Text” input box, type as desired.

Note: To add a radio button, click the add button,




To remove a radio button, click the remove button,



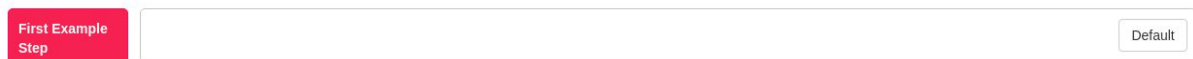
-
7. Click the save button,




Adding Button Field

1. Click the “Button” button,  Button, the following items will appear on the screen:

Example Script



First Example Step Default

2. Click the “Default” button, , once clicked the “Edit Field” for the Label step will appear on the right-hand side of the screen as shown below:



Add Field Edit Field

Remove

Label

Default

Class

Default ▼

Action

▼

3. Click the “Label” input box, type as desired.

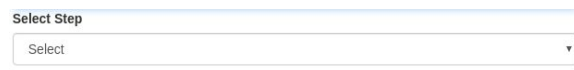
4. Click the “Class” dropdown box. The following dropdown menu will appear:



5. Select the desired button color.
6. Click the “Action” dropdown box. The following dropdown menu will appear:



The following actions are explained below:

Next Step	If the button is clicked, the next step will appear.
Previous Step	If the button is clicked, the previous step will appear.
Go to	<p>If Go to action is used, the following additional dropdown box will appear:</p>  <p>Select the desired step that will appear after the button is clicked.</p>

Finish Scripter	If the button is clicked, the scripter will finish.
-----------------	---

7. Click the save button,




Adding POST Field

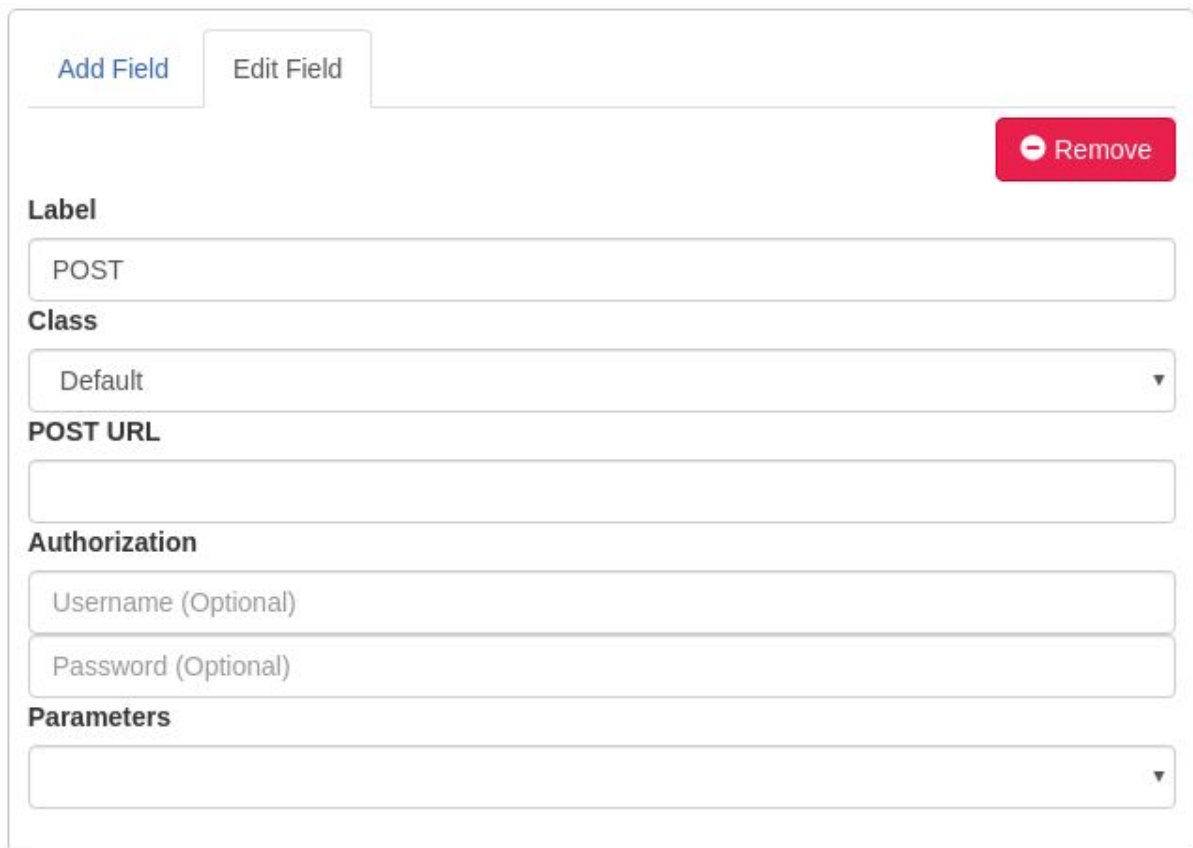
When using a CRM, it sends information to the web service to be pulled into CRM.

1. Click the “POST” button,  , the following items will appear on the screen:

Example Script



2. Click the “POST” button,  , once clicked the “Edit Field” for the Label step will appear on the right-hand side of the screen as shown below:



Add Field **Edit Field**

Remove

Label

POST

Class

Default ▼

POST URL

Authorization

Username (Optional)

Password (Optional)

Parameters

▼

3. Click the “Label” input box, type as desired.

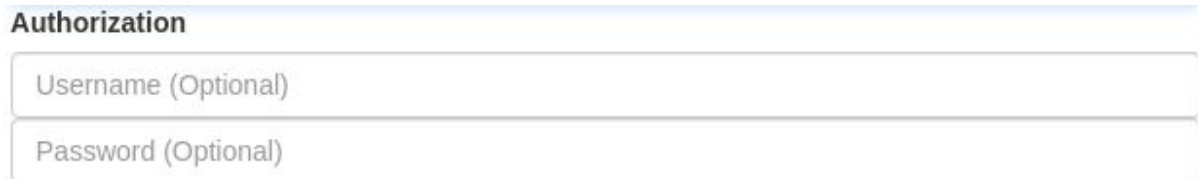
- Click the “Class” dropdown box. The following dropdown menu will appear:

Class



- Select the desired POST button color.
- Click the “POST URL” input box, type the desired URL.
- Under the Authorization subtitle, there are two optional input boxes, as shown below:

Authorization



If needed, type the Username and Password in the corresponding input boxes.

- Click the “Parameters” dropdown box. The following dropdown menu will appear, as shown below:


Parameters



The following parameters are explained below:

All Contact Data	Only pulls data from Call Center Studio tenant uploaded in the Contact section.
------------------	---

Scripter Data	Only pulls data from the scripter inputs.
All Contact Data with Scripter Data	Pulls both the Call Center Studio tenant data and the scripter inputs.

9. Click the save button,  .

Adding Text Field

1. Click the “Text” button, , the following items will appear on the screen:

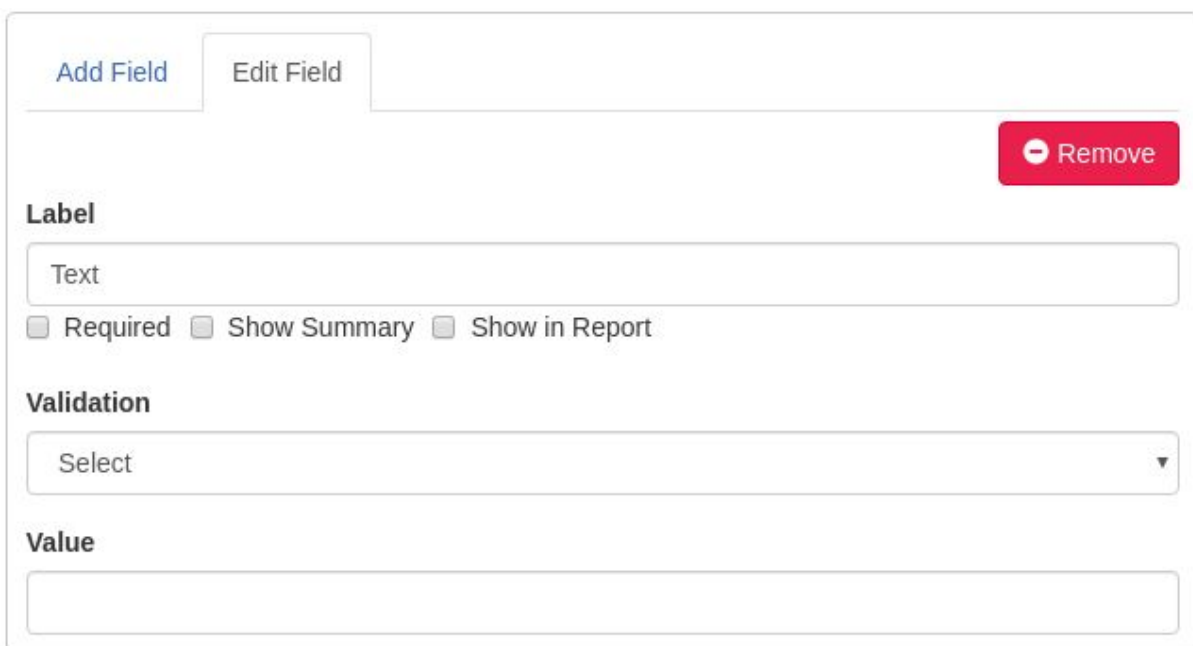
Example Script



2. Double click the “Text” window once clicked it will become shaded as shown below:



Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	Shows the following field. "Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.


Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:




5. Click the “Validation” dropdown box. The following dropdown menu will appear, as shown below:



-
6. Select the desired validation option.
 7. In the “Value” input box, type as desired.

8. Click the save button,  .

Adding Checkboxes Field

1. Click the “Checkboxes” button, , the following items will appear on the screen:

Example Script



First Example Step

Checkboxes

☐

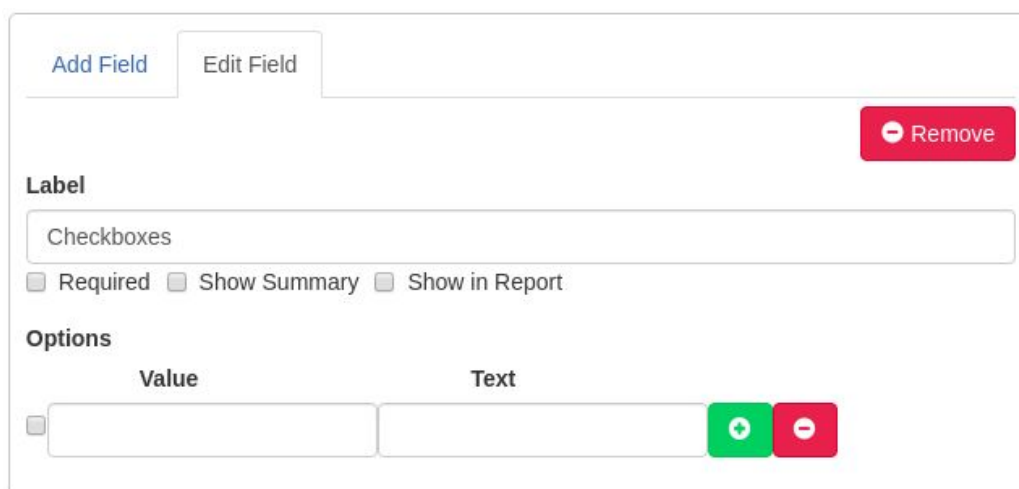
2. Double click the “Checkboxes” window once clicked it will become shaded as shown below:



Checkboxes

☐

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



Add Field Edit Field Remove

Label

Checkboxes

☐ Required ☐ Show Summary ☐ Show in Report

Options

Value	Text
<input type="checkbox"/>	<input type="text"/>

+ -

3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:



5. Click the “Value” input box, type as desired.
6. Click the “Text” input box, type as desired.

Note:


To add a checkbox, click the add button, .

To remove a checkbox, click the remove button, .

-
7. Click the save button,



Adding Drop Down Field

1. Click the “Drop Down” button, , the following items will appear on the screen:

Example Script

First Example Step

Dropdown



2. Double click the “Drop Down” window once clicked it will become shaded as shown below:

Dropdown



Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:

Add Field

Edit Field

Remove

Label

Dropdown

☐ Required ☐ Show Summary ☐ Show in Report

Options

Value	Text
<input type="checkbox"/>	<input type="text"/>

Multiple Data Entry

3. Click the “Label” input box, type as desired.
4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:





A screenshot of a software interface showing a dropdown menu. The dropdown is open, displaying three options: "Required", "Show Summary", and "Show in Report". All three options are highlighted in red, indicating they are selected. The dropdown is labeled "Dropdown" at the top.

5. Click the “Value” input box, type as desired.

6. Click the “Text” input box, type as desired.

Note:

To add a dropdown selection, click the add button, .


To remove a dropdown selection, click the remove button, .


To perform multiple data entry, click the “Multiple Data Entry” button,



, the following window will appear:

A screenshot of a window titled "Multiple Data Entry" with a close button (X) in the top right corner. The window contains a large, empty text input area with a blue border. Below the input area is a blue "Add" button.


Type as desired, then click the “Add” button, .

7. Click the save button, .

Adding Dynamic Drop Down Field

When using a CRM, allows the dropdown box selection to change dynamically based on changes to a CRM.

1. Click the “Dynamic Drop Down” button,



the following items will appear on the screen:

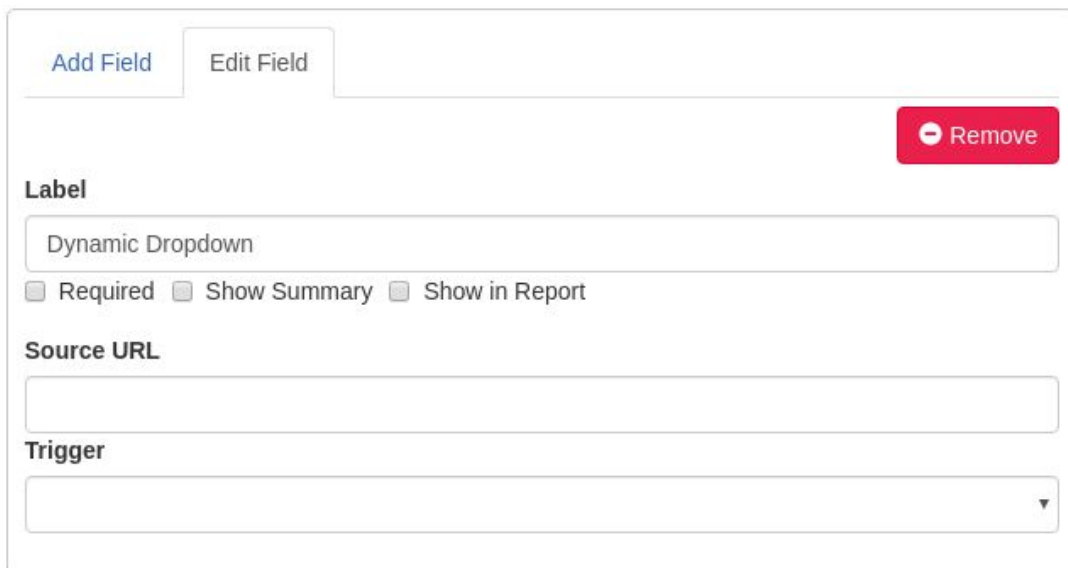
Example Script



2. Double click the “Dynamic Drop Down” window once clicked it will become shaded as shown below:



Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



The dialog shows tabs for 'Add Field' and 'Edit Field'. Under the 'Edit Field' tab, there is a 'Label' section with a text field containing 'Dynamic Dropdown' and three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. Below this is a 'Source URL' section with a text field. At the bottom is a 'Trigger' section with a dropdown menu. A red 'Remove' button is located in the top right corner of the dialog.

3. Click the “Label” input box, type as desired.
4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report


The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:



5. In the “Source URL” input box, type the desired source URL.
6. In the “Trigger” dropdown box, select the desired trigger.

7. Click the save button, .

Adding Date Field

1. Click the “Date” button, , the following items will appear on the screen:

Example Script



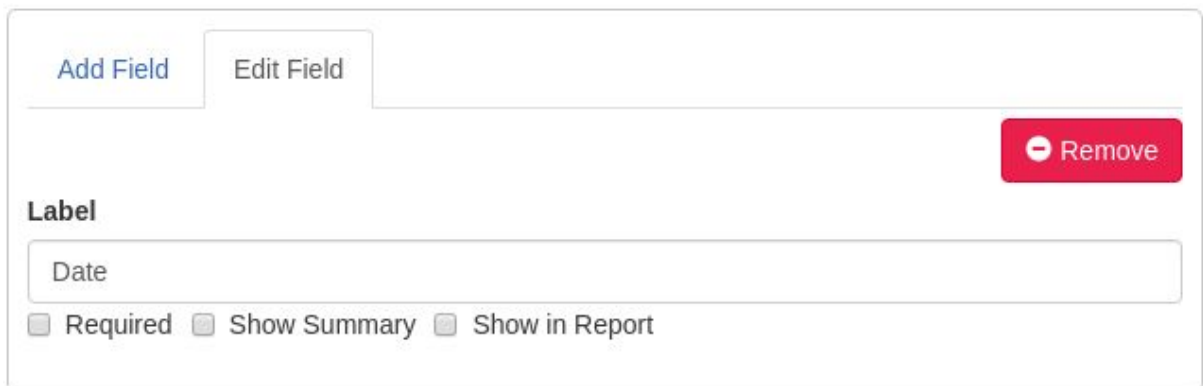
The screenshot shows a script editor window. On the left, there is a red tab labeled 'First Example Step'. The main area contains a field labeled 'Date' with a dotted border, indicating it is a new or unconfigured field.

2. Double click the “Date” window once clicked it will become shaded as shown below:



The screenshot shows the 'Date' field from the previous image, now shaded gray, indicating it has been selected or is the active field.

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



The screenshot shows the 'Edit Field' dialog box. It has two tabs: 'Add Field' and 'Edit Field'. The 'Edit Field' tab is active. Inside the dialog, there is a 'Label' section with an input box containing the text 'Date'. Below the input box are three checkboxes: 'Required', 'Show Summary', and 'Show in Report'. A red 'Remove' button is located in the top right corner of the dialog.

3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

☐ Required ☐ Show Summary ☐ Show in Report

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: When the checkboxes are selected, they can be seen in red under the field details, as shown below:

Date

Required
Show Summary
Show in Report

5. Click the save button,




Editing a Field

1. Double click the desired field window, once clicked it will become shaded like the example shown below:



Also, the “Edit Field” for the desired step will appear on the right-hand side of the screen like the example shown below:

A screenshot of the "Edit Field" panel. At the top, there are two tabs: "Add Field" and "Edit Field", with "Edit Field" being the active tab. Below the tabs, there is a "Label" section with a text input field containing the word "Label". To the right of this section is a red button with a minus icon and the text "Remove". Below the text input field, there are three checkboxes: "Required", "Show Summary", and "Show in Report", all of which are currently unchecked.

2. Make the desired changes.
3. Click the save button, .

Deleting a Field

1. Double click the desired field window, once clicked it will become shaded like the example shown below:




Also, the “Edit Field” for the desired step will appear on the right-hand side of the screen like the example shown below:

A screenshot of the 'Edit Field' panel. At the top, there are two tabs: 'Add Field' and 'Edit Field', with 'Edit Field' being the active tab. Below the tabs, there is a large text input field containing the word 'Label'. To the right of this field is a red button with a white minus icon and the text 'Remove'. Below the text input field, there are three checkboxes: 'Required', 'Show Summary', and 'Show in Report', all of which are currently unchecked.

2. Click the remove button,



Adding a Scripter Step

1. Click the new button, , in the top right corner, the following pop-up screen will appear:




The "Add Step" pop-up screen features a title bar with "Add Step" and a close button (X). Below the title bar is a text input field labeled "Step Name". At the bottom right of the pop-up is a blue "Save" button.

2. Click the "Step Name" input box, type as desired. An example is shown below:




This screenshot shows the "Add Step" pop-up screen with the text "Second Example Step" entered into the "Step Name" input field. The "Save" button remains at the bottom right.

3. Click the save button, , . The new step will be shown on the left-hand side of the scripter screen.



The "Example Script" screen displays a list of steps on the left-hand side. The first step, "First Example Step", is highlighted with a red background. The second step, "Second Example Step", has a grey background. To the right of the steps is a large text area for the script content.


4. Click the save button, , .

Deleting a Scripter Step


1. Click the desired step, once clicked, the step will transition to red as seen below:





2. Click the delete button,  .

3. Click the save button,  .

Editing a Scripter

1. To edit a scripter, click the edit button,  , located on the far right of the Scripter name after the “Date” column as shown below:

Date	
2020-06-12 17:29:48	 

2. Make Changes as desired.
3. Click the save button,  .
4. Click the return button,  , to return to the Scripter list.

Deleting a Scripter

1. From the Scripter list, check the desired scripter, on right-hand side of the scripter name as shown below:



Scripter List

Display records

<input type="checkbox"/>	↕	Scripter Name
<input checked="" type="checkbox"/>		Example Script

2. Confirm the deletion by clicking the delete button, .

Viewing a Scripter

- To view a scripter, click the view button, , located on the far right of the Scripter name after the edit button, , as shown below:

Date	
2020-06-12 17:29:48	 

The following is an example pop-up window of the Example Script, showing a date step:

Customer Services - Google Chrome

demo.callcenterstudio.com/v2/en/scripter_mt.html?sk=ahRzfm11c3RlcmktaGl6bWV0bGVyaXlVcXlU2NyaXB0...

Example Script

First Example Step

Call Date

June 2020

Mo	Tu	We	Th	Fr	Sa	Su
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Profile Information

Name

Surname

Phone

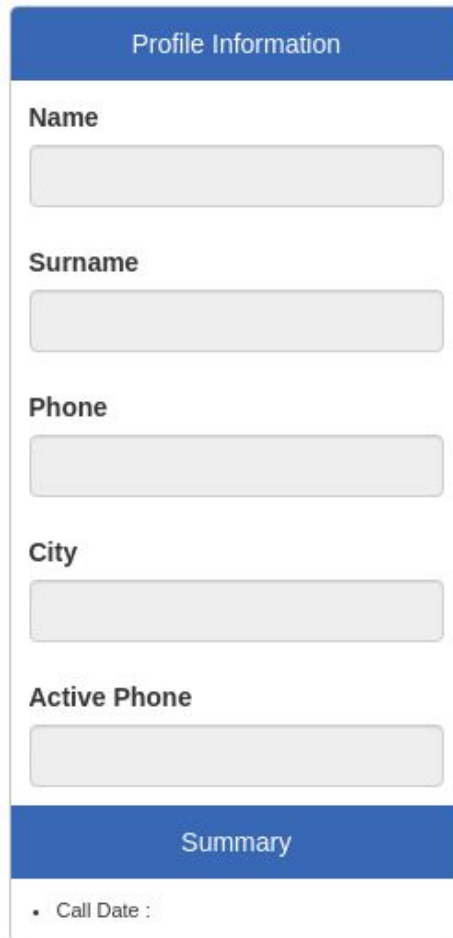
City

Active Phone

Summary

Note: The Profile information section on the right-hand side of the screen will pull information regarding the contact that is run through the campaign (assuming the information was added to the contact on the Call Center Studio contact list section.

Also, if “Show Field Summary” checkbox was selected for the fields, the field name will be displayed below the Profile Information section, as shown below:



Profile Information

Name

Surname

Phone

City

Active Phone

Summary

- Call Date :

2. After viewing, click the “X,” , to exit.

Searching a Scripter

1. Click the “Search” input box, type the scripter’s name, the input box is shown below:


Search :

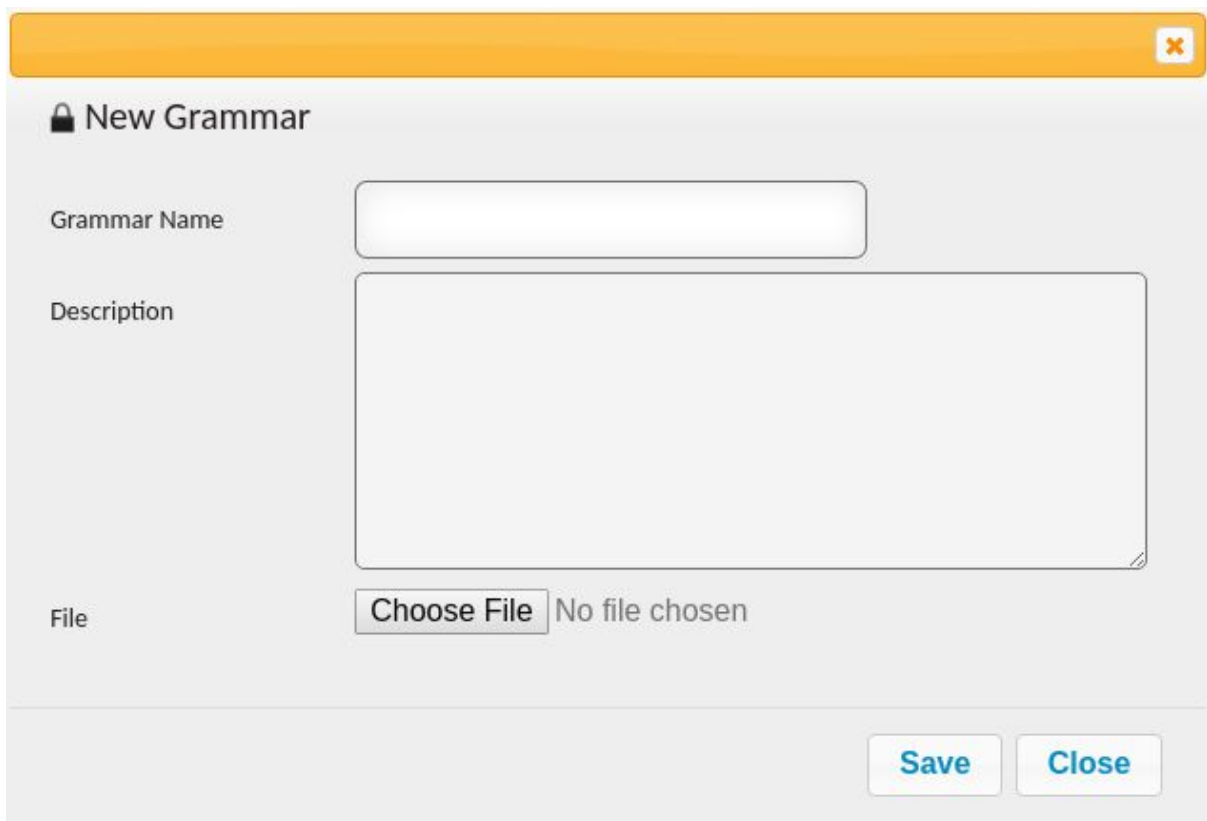
Note: Partial names can be used, when spelled correctly.

Grammar




Adding a Grammar

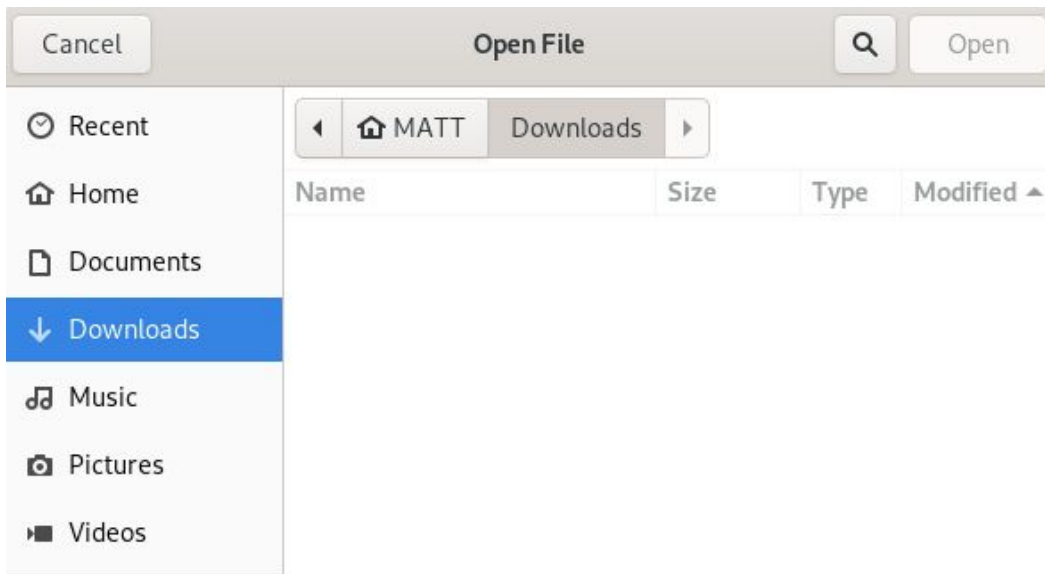
1. Click the new button, , in the top right-hand corner, the following pop-up screen will appear as shown below:



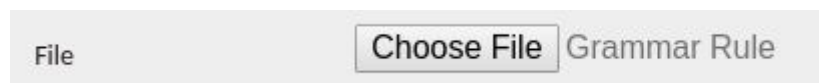
The pop-up screen has a yellow title bar with a close button (X) in the top right corner. The main content area is light gray and contains the following elements:

- New Grammar**: A title with a lock icon on the left.
- Grammar Name**: A text label followed by a single-line text input field.
- Description**: A text label followed by a large multi-line text area.
- File**: A text label followed by a file selection control consisting of a 'Choose File' button and the text 'No file chosen'.
- Buttons**: Two buttons, 'Save' and 'Close', are located at the bottom right of the dialog.

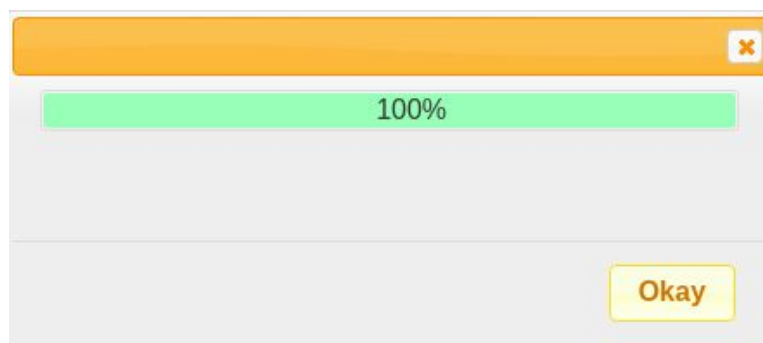
2. In the “Grammar Name” input box, type the desired name.
3. In the “Description” input box, if desired, type a description.
4. Click the “Choose File” button, . The file explorer will appear, as shown below:

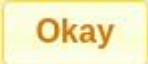


5. Double click the desired grammar file. The grammar rule will appear in the pop-up window, as shown below:





6. Click the save button, . The following pop-up window will appear:

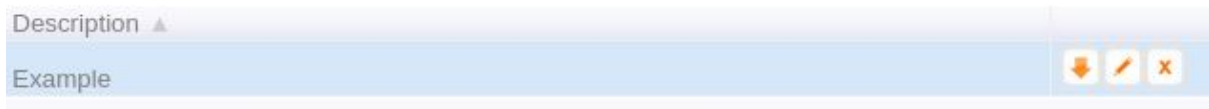


7. Click the okay button, . The newly created grammar will appear in the grammar name list, as shown below:



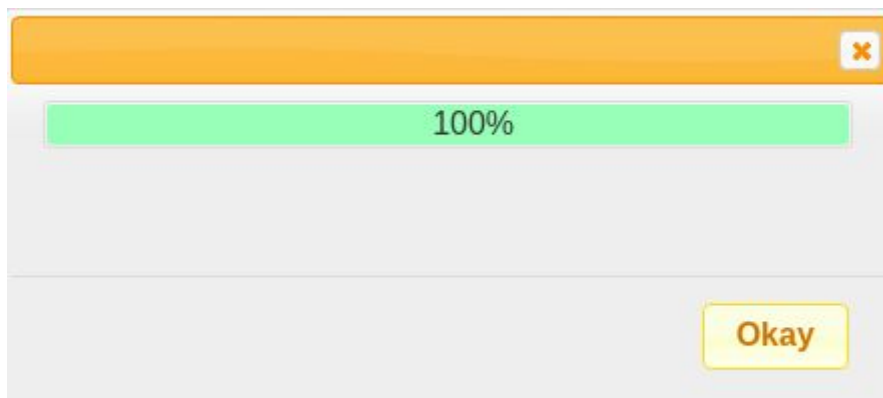
Editing a Grammar

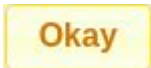
1. To edit a grammar, click the edit button, , located on the far right of the Grammar name after the download button, , as shown below:




2. Make changes as desired.

3. Click the save button, , . The following pop-up window will appear:





4. Click the okay button, , .

Downloading a Grammar

1. To edit a grammar, click the download button, , located on the far right of the grammar name after the “Description” column as shown below:



Deleting a Grammar



1. From the Grammar name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

New Grammar Example grammar will be deleted permanently. Do you want to continue?

Cancel

OK

- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted grammar will not be shown.

Searching for a Grammar

1. Click the “Name” input box, type the grammar’s name, the input box is shown below:


A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Name" is written in a gray, sans-serif font. To the right of the text is a white rectangular input field with a thin gray border and rounded corners.

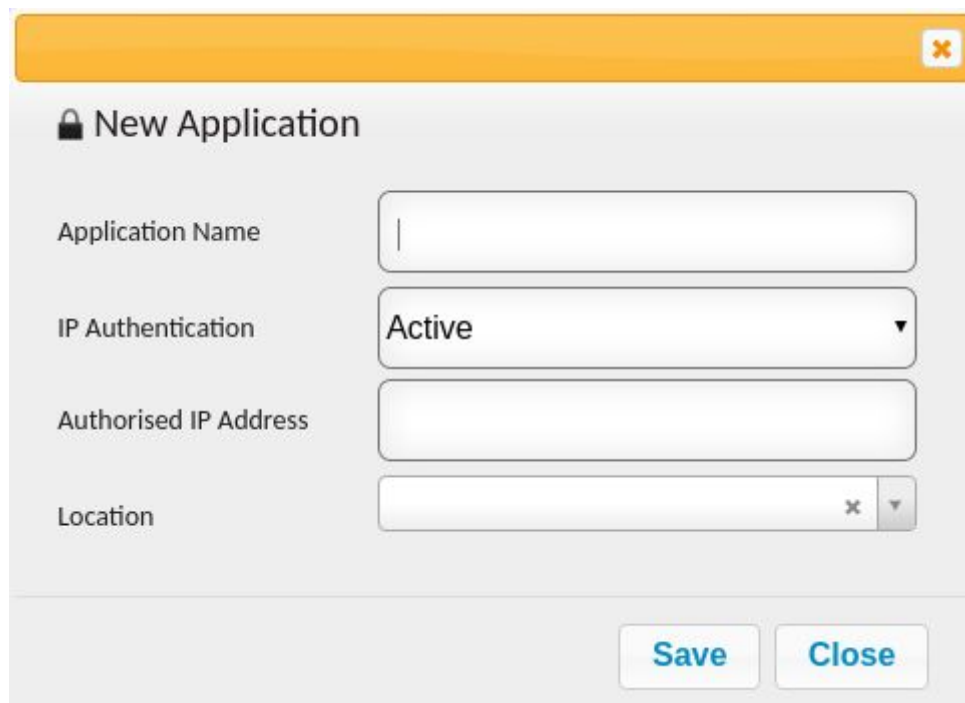
Note: Partial names can be used, when spelled correctly.

Applications



Adding an Application

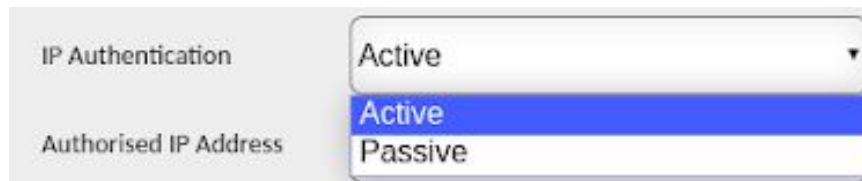
1. Click the new button, , in the top right corner the following pop-up screen will appear as shown below:




The pop-up screen has a yellow title bar with a close button (X) in the top right corner. Below the title bar, the text "New Application" is displayed with a lock icon to its left. The form contains four fields: "Application Name" (a text input box), "IP Authentication" (a dropdown menu currently showing "Active"), "Authorised IP Address" (a text input box), and "Location" (a text input box with a clear (X) button and a dropdown arrow on the right). At the bottom right of the form are two buttons: "Save" and "Close".

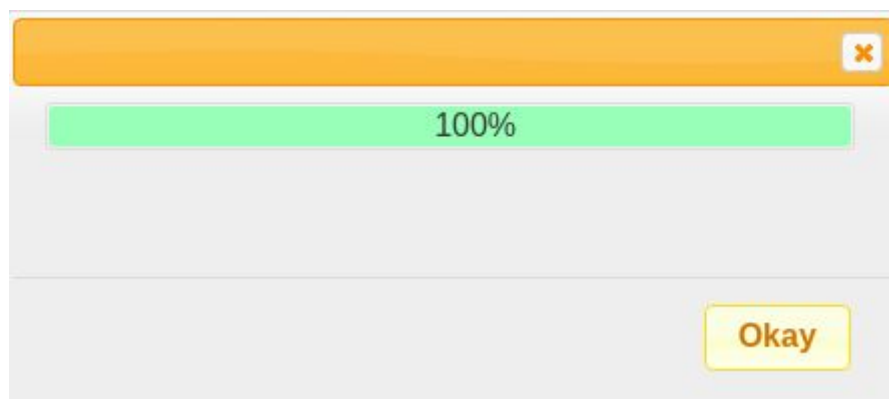
2. Click the "Application Name" input box, type the desired name.

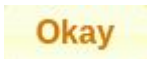
- Click the “IP Authentication” dropdown box. The following dropdown menu will appear:




Note: Only used when IP authorization is needed, “Active” needs to be selected. Otherwise, select “Passive.”

- Select the desired IP Authentication.
- In the “Authorised IP Address” input box, type the authorized IP address.
- If the created application is only desired to be used at specific locations, click the “Location” dropdown box and select the desired location (See the Location section for creating a location).
- Click the save button, . The following pop-up window will appear:



- Click the “Okay” button, .

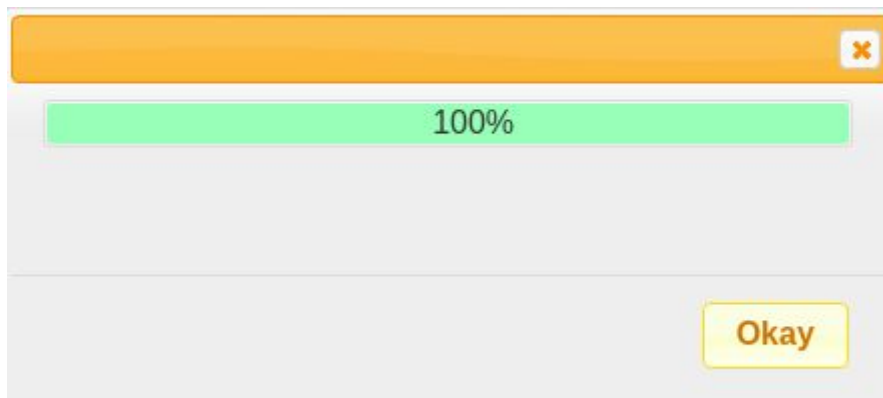
Editing an Application

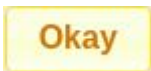
1. To edit an application, click the edit button, , located on the far right of the application name after the “Deleted” column as shown below:





2. Make changes as desired.

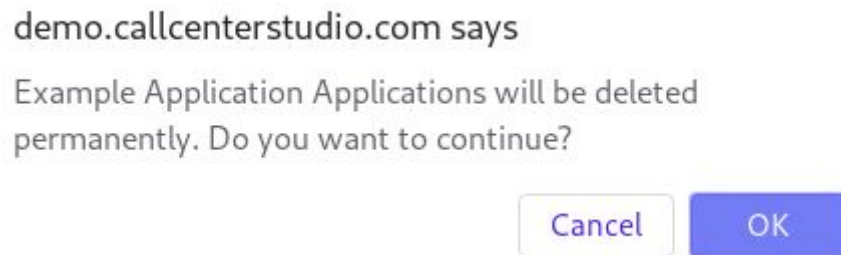
3. Click the save button, , . The following pop-up window will appear:





4. Click the okay button, , .

Deleting an Application

1. From the Application name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload and to the right of the deleted application name in the “Delete Column” will say “Yes” as shown below:



Searching for an Application

1. Click the “Name” input box, type the application’s name, the input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Name" is written in a dark gray, sans-serif font. To the right of the text, there is a white rectangular input field with a thin gray border and rounded corners.

Note: Partial names can be used, when spelled correctly.


Tags



Tags are the various methods through which managers and agents can quickly identify an individual call or set of calls. Tags are used to distinguish calls from one another and serve as a reminder for future actions. The image below is an outline of the tag section

Tags		Delete	agent	chat
+ Customer Service	+ Add Child Tag	✗	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+ Testing	+ Add Child Tag	✗	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+ Testing	+ Add Child Tag	✗	<input type="checkbox"/>	<input type="checkbox"/>

Adding a tag

1. To create a root tag, click the add root tag  button.
2. Input the desired name of the root tag in the blank section shown below



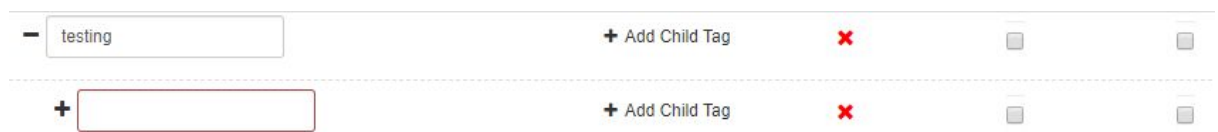
A text input field with a plus sign icon to its left, intended for entering the name of a root tag.

3. Select the “agent” or “chat” checkbox(es) as desired.

Creating a Child Tag

Child Tags are subtags to the Root Tag created.

1. Click the “Add Child Tag” button,  , the following will be displayed below the Root Tag:



The screenshot shows a list of tags. The first tag is named "testing" and has a minus sign icon to its left. To its right are four icons: a plus sign with the text "Add Child Tag", a red X, and two checkboxes. Below this is a dashed line, followed by a second tag entry. This second entry has a plus sign icon to its left, an empty text input field, and the same four icons to its right.

2. Type the desired name for the tag.
3. Select the “agent” or “chat” checkbox(es) as desired.

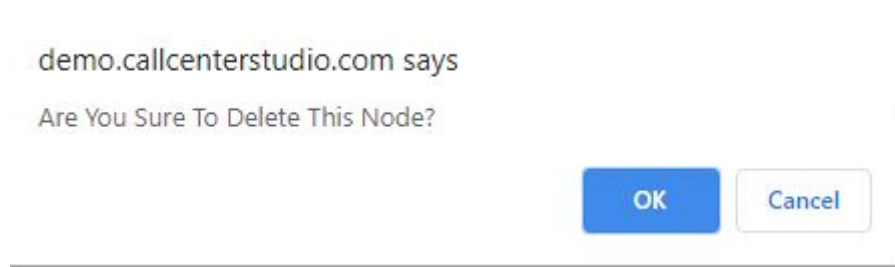
Editing a Tag or a Child Tag



1. For any tag or child tag, click the text input box of the tag’s name to modify the tag’s name.
2. Select and Deselect the “agent” and “chat” checkboxes as desired.

Deleting a Tag or a Child Tag

1. Tags can be deleted by pressing the delete  button on the column of the desired tag.

The following pop-up window will appear:



- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

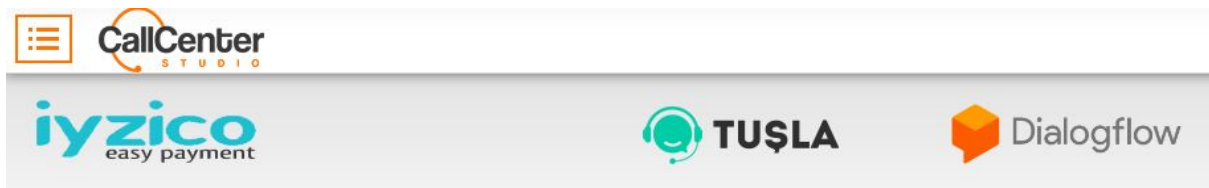
The screen will reload and the deleted tag will not be shown.

Note: the child tags must be deleted before deleting the root tag. Using the same instructions as above, child tags can be deleted.

Integrations

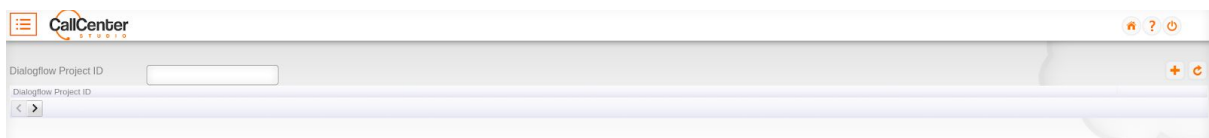


Some third-party integrations are built directly into the tenant. They can be found under the Integrations tab.




Note: Dialogflow is the only integration that is explained in the Call Center Studio Manual. If desired, other integrations can be set up by the assigned Call Center Studio Project Manager.

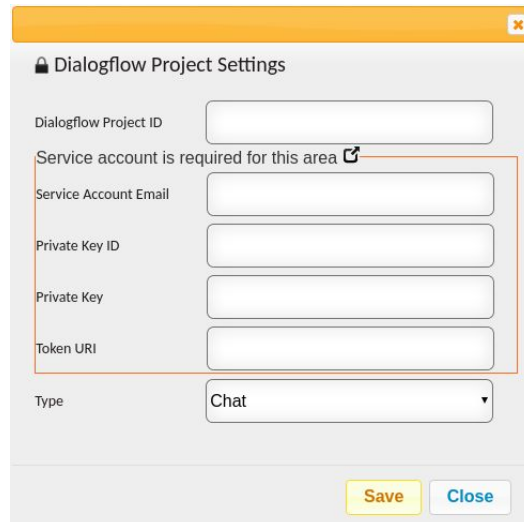
Select Dialogflow; the following screen will appear:



Creating a Dialogflow Project

1. Click on the add button, , located on the top right corner of the Dialogflow tab.

The following will appear as shown below:





The image shows a 'Dialogflow Project Settings' dialog box. It has a title bar with a close button. The main area contains several input fields: 'Dialogflow Project ID', 'Service Account Email', 'Private Key ID', 'Private Key', and 'Token URI'. A red box highlights the 'Service Account Email', 'Private Key ID', 'Private Key', and 'Token URI' fields. Above the 'Service Account Email' field, there is a message: 'Service account is required for this area' with an external link icon. At the bottom, there is a 'Type' dropdown menu currently set to 'Chat'. At the very bottom of the dialog are 'Save' and 'Close' buttons.



After creating a JSON private key in the Google Dialogflow account, the following information can be retrieved and entered into the input boxes (If experiencing issues, please contact the assigned Call Center Studio Project Manager):

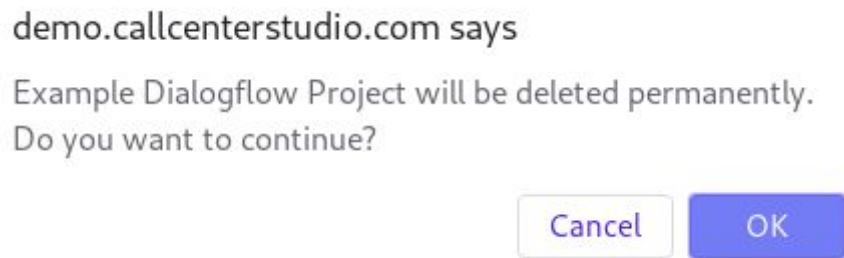
2. Click the “Dialogflow Project ID” input box, type the project ID from the JSON private key.
3. Click the “Service Account Email” input box, type the client email from the JSON private key.
4. Click the “Private Key ID” input box, type the private key id from the JSON private key.
5. Click the “Token URL” input box, type the token URL from the JSON private key.
6. Click the “Type” dropdown menu, select whether the Dialogflow will be used for chat or call.



Editing a Dialogflow Project

1. Click the edit button, , located to the far right of the project name.
2. Make the necessary changes.
3. Click the “Save” button, .

Deleting a Dialogflow Project

1. From the Dialogflow project name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted Dialogflow project will not be shown.

Searching for a Dialogflow Project

1. Click the “Dialogflow Project ID” input box, type the project name the input box is shown below:

A screenshot of a web interface showing a light gray rectangular box. Inside the box, on the left, is the text "Dialogflow Project ID" in a gray font. To the right of this text is a white rectangular input field with a thin gray border.

Note: Partial names can be used, when spelled correctly.

Admin Activities



The Admin Activities section provides records of all admin activities: to include additions, modifications, and deletions. Through this section, all activities can be searched and filtered, as explained below.

Searching for an Activity

There are five ways to search for an Activity. Activities can be searched for using the separate filter options or a combination of filter options explained below:

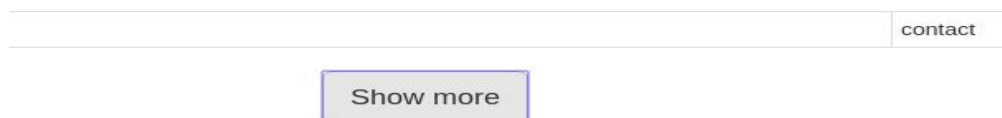
Direct

All activities are listed in chronological order (most recent first) in the activity feed as shown below:

Action Date	User
2020-04-16 20:04:42	matthew.christina@callcenterstudio.com
2020-04-16 19:58:35	matthew.christina@callcenterstudio.com
2020-04-16 19:51:23	matthew.christina@callcenterstudio.com
2020-04-16 19:50:41	matthew.christina@callcenterstudio.com
2020-04-16 19:49:01	matthew.christina@callcenterstudio.com

1. Use the scroll bar on the right-hand side of the activity feed screen to scroll up and down to find the activity directly; the 75 most recent activities are shown. If desired, more activities can be displayed by clicking the “Show More” button,

Show more , displayed in the middle at the bottom of the first 75 activities. As shown below:



2. After finding a specific activity, the activity can be viewed in detail by clicking the highlighted in blue Action Date as shown below:

Action Date

2020-04-16 20:04:42

Once the highlighted in blue Action Date, is clicked, the following information can be observed:

Action Details

Action Date: 2020-04-14 20:25:40

User Name: matthew.christina@callcenterstudio.com

Admin User Name:

App Token:

Resource Type: contact

Action: update

Details:

Resource ID: ahRzfm11c3RlcmktaGl6bWV0bGVyaXIUCxIHQ29udGFjdBiAgLjB5ZyOCgyiARlkZW1vLmNhbgxjZW50ZXJzdHVkaW8uY29t

Source IP: 37.130.123.208

Source UA: Mozilla/5.0 (X11; Linux x86_64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/79.0.3945.88 Safari/537.36

OLD	NEW
1 listname=null	1 listname=null
2 nationalid=United States	2 nationalid=United States
3 workphone=null	3 workphone=null
4 description=null	4 description=Call Center
5 gender=	5 gender=
6 company=John's Call Center	6 company=John's Call Center
7 list=null	7 list=null
8 customerid=null	8 customerid=null
9 dateofbirth=2020-04-09	9 dateofbirth=2020-04-09
10 workaddress=null	10 workaddress=101 John's Way, Anywhere, USA, 10000
11 elastic_status=null	11 elastic_status=null
12 IsDeleted=false	12 IsDeleted=false
13 homeaddress=null	13 homeaddress=101 John's Way, Anywhere, USA, 10000
14 mobilephone=null	14 mobilephone=null
15 customfields=null	15 customfields=null
16 otherphone=null	16 otherphone=null
17 email=johnsmith@johnscallcenter.com	17 email=johnsmith@johnscallcenter.com
18 homephone=null	18 homephone=null
19 name=John Smith	19 name=John Smith
20	20

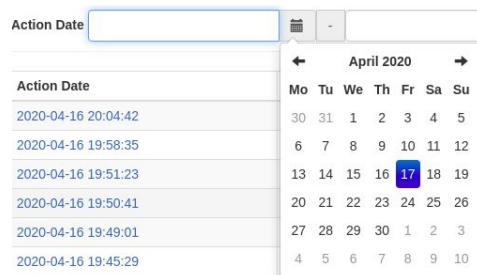
diff view generated by jsdiff

As seen above, these action details show the update of a contact within the contacts section of the Administrator screen.

Action Date

The activity can also be filtered according to a date range, as demonstrated below:

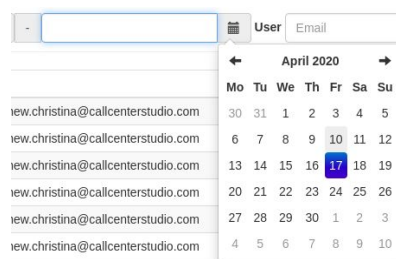
1. Click the “Action Date” start date input box. A calendar pop-up will appear to facilitate proper start date selection, as shown below:



2. Select the desired start date range, as demonstrated below:



3. Click the “Action Date” end date input box. A calendar pop-up will appear to facilitate accurate end date selection, as shown below:



4. Select the desired end date range as demonstrated below:




5. Click the Apply Filter button, , the filtered date range will be displayed in the activity feed showing the start date range first as shown below:

Action Date	User
2020-03-30 17:23:09	cemal.yilmaz@callcenterstudio.com
2020-03-30 13:26:42	umut.turhan@callcenterstudio.com
2020-03-30 13:12:56	umut.turhan@callcenterstudio.com
2020-03-30 13:12:16	umut.turhan@callcenterstudio.com

User

1. Click the “User” input box, type the desired user’s complete email address, as shown below:

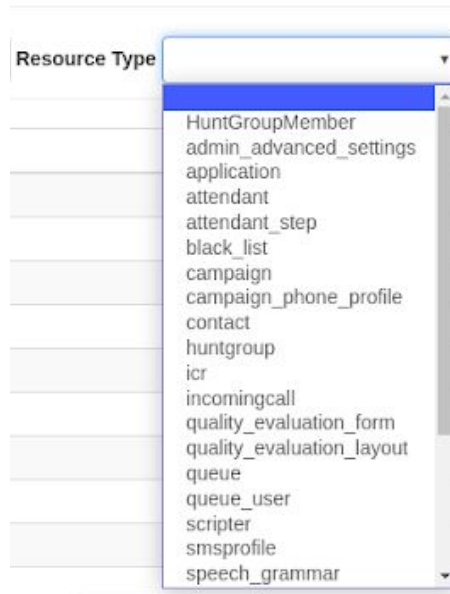
User

2. Click the Apply Filter button, , the filtered User range will be displayed in the activity feed showing the most recent date range first as shown below:

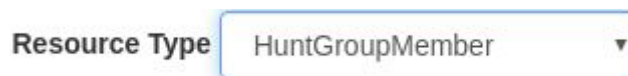
Action Date	User
2020-04-16 20:04:42	matthew.christina@callcenterstudio.com
2020-04-16 19:58:35	matthew.christina@callcenterstudio.com
2020-04-16 19:51:23	matthew.christina@callcenterstudio.com
2020-04-16 19:50:41	matthew.christina@callcenterstudio.com


Resource Type

1. Click the “Resource Type” input box. A dropdown list will appear to facilitate proper resource type selection, as shown below:



2. Choose the desired Resource Type; an example is displayed below:

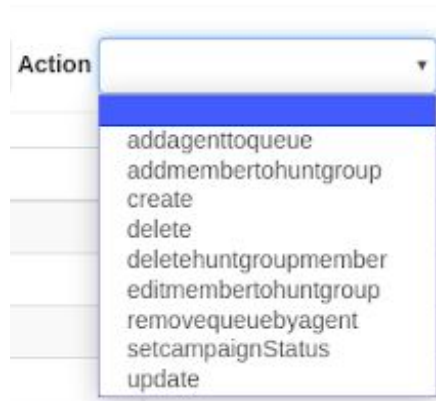


3. Click the Apply Filter button, , the filtered resource type range will be displayed in the activity feed showing the most recent date range first as shown below:

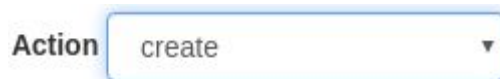
Resource Type
HuntGroupMember
HuntGroupMember
HuntGroupMember


Action

1. Click the “Action” input box. A dropdown list will appear to facilitate accurate action selection, as shown below:



2. Using the dropdown list, choose the desired action. An example is displayed below:



3. Click the Apply Filter button, , the filtered action range will be displayed in the activity feed showing the most recent date range first as shown below:




Incoming Chat

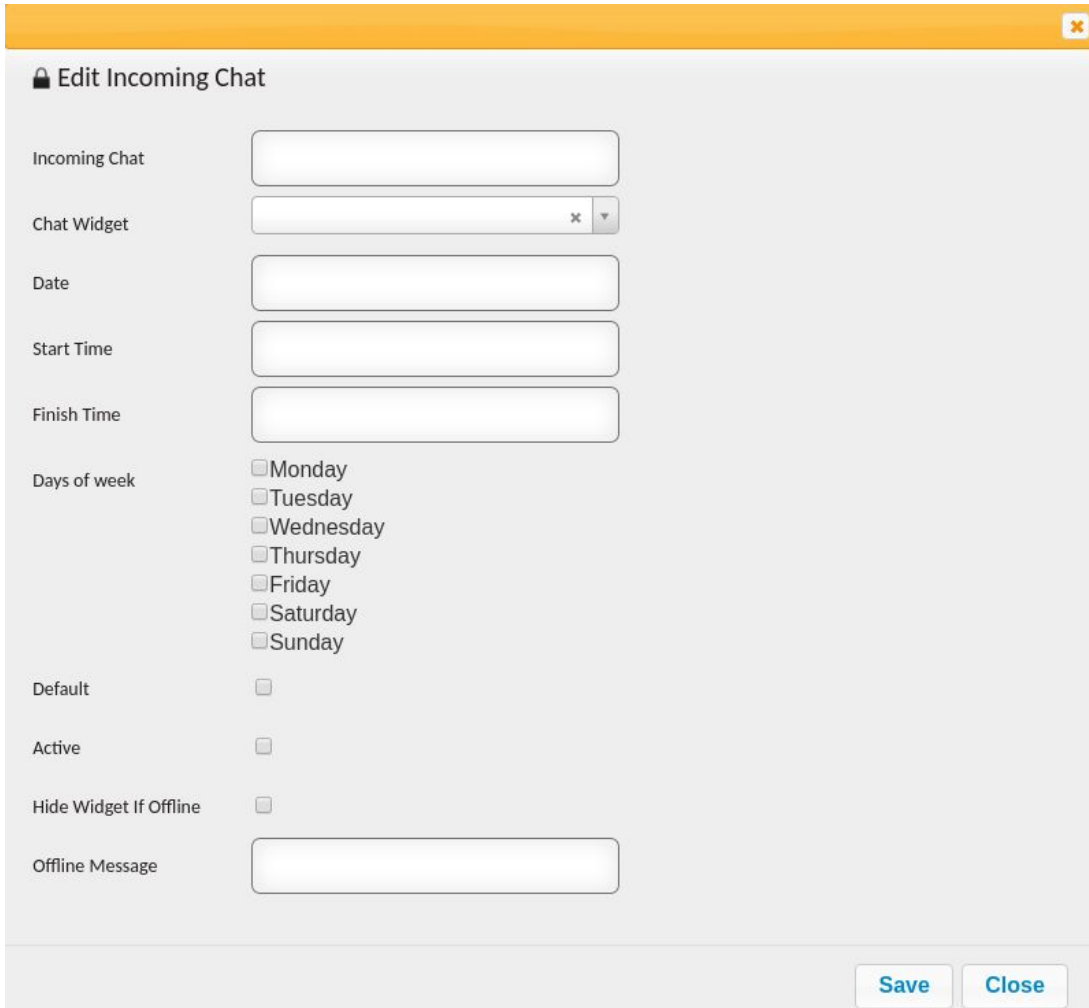


All chats need an incoming chat associated with them. This section is to activate the chat and, if desired, create time constraints when the chat is in use.

Creating an Incoming Chat

1. Click the New button, , located in the top right corner of the incoming chat screen.

The following pop-up screen will appear, as shown below:

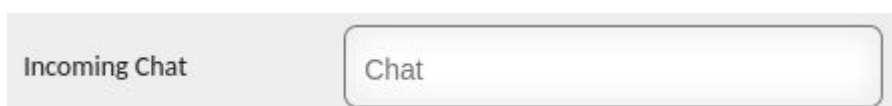


The screenshot shows a pop-up window titled "Edit Incoming Chat" with a close button in the top right corner. The form contains the following fields and options:

- Incoming Chat:** A text input field.
- Chat Widget:** A dropdown menu with a close button (x) and a dropdown arrow (v).
- Date:** A date input field.
- Start Time:** A time input field.
- Finish Time:** A time input field.
- Days of week:** A list of checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Default:** A checkbox.
- Active:** A checkbox.
- Hide Widget If Offline:** A checkbox.
- Offline Message:** A text input field.

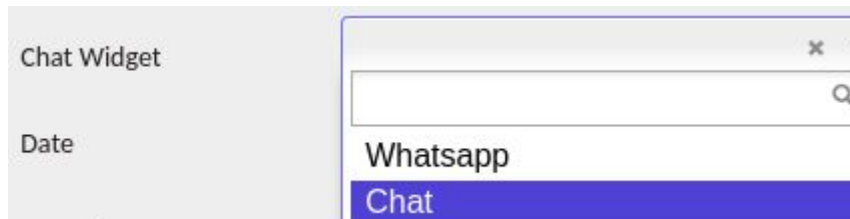
At the bottom right, there are two buttons: "Save" and "Close".

2. Click the "Incoming Chat" input box, type the desired incoming chat name as seen below:

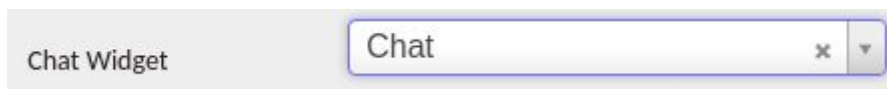


The screenshot shows a text input field with the placeholder text "Incoming Chat" and a text input field with the placeholder text "Chat".

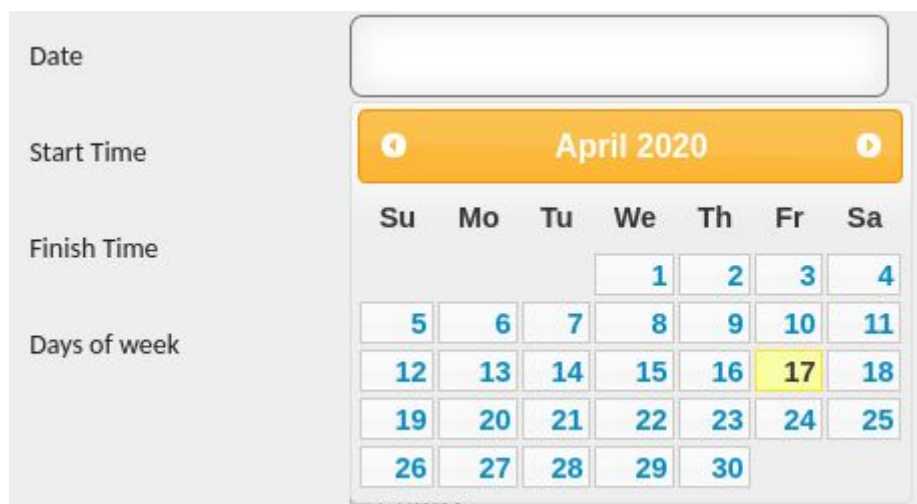
3. Click the “Chat Widget” input box, a dropdown of created chat widgets will appear
(See **Chat Widgets > Creating a Chat Widget** section for details on creating a chat widget) as shown below:



4. Select the desired chat widget; an example is displayed below:



5. Click the “Date” input box. A calendar pop-up will appear to facilitate accurate date selection, as shown below:

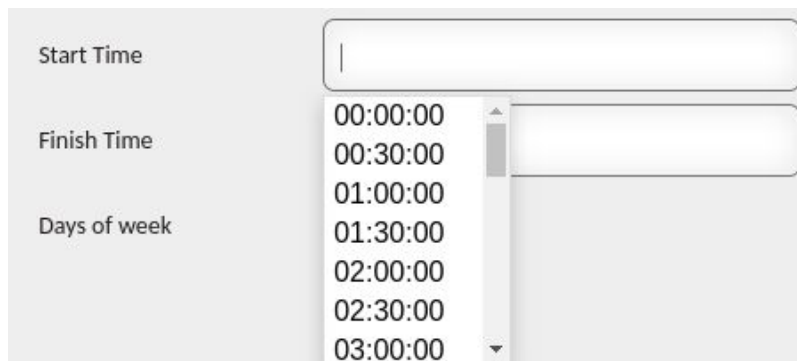


6. Select the desired date; an example is displayed below:



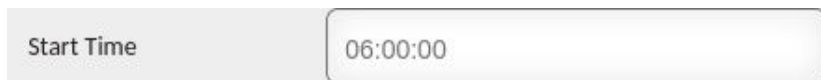
A screenshot of a web form with a label "Date" on the left and a text input box on the right. The input box contains the text "2020-04-01".

7. Click the “Start Time” input box. A dropdown list will appear to facilitate accurate start time selection, as shown below:



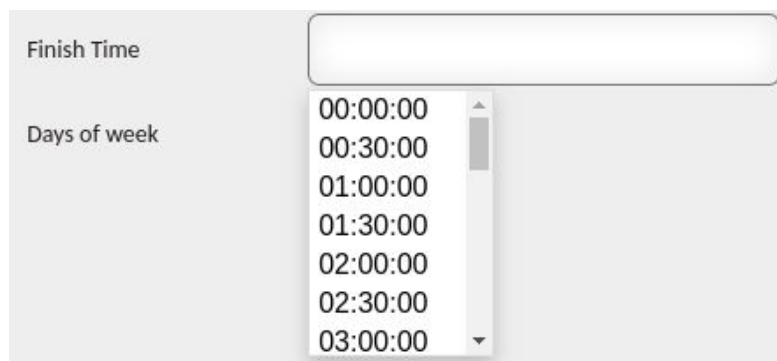
A screenshot of a web form showing the "Start Time" field. The input box is empty, and a dropdown menu is open below it, displaying a list of times from 00:00:00 to 03:00:00 in 30-minute increments. To the left of the input box are labels for "Start Time", "Finish Time", and "Days of week".

8. Select the desired start time; an example is displayed below:



A screenshot of a web form showing the "Start Time" field. The input box now contains the text "06:00:00".

9. Click the “Finish Time” input box. A dropdown list will appear to facilitate accurate finish time selection, as shown below:



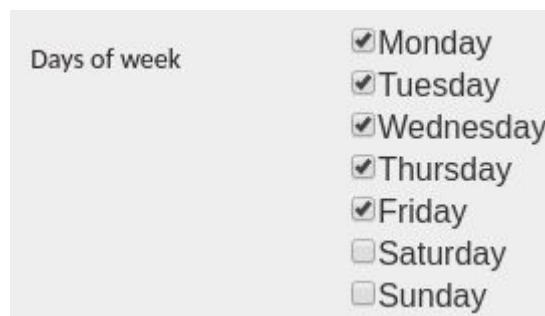
A screenshot of a web form showing the "Finish Time" field. The input box is empty, and a dropdown menu is open below it, displaying a list of times from 00:00:00 to 03:00:00 in 30-minute increments. To the left of the input box are labels for "Finish Time" and "Days of week".

10. Select the desired finish time; an example is displayed below:



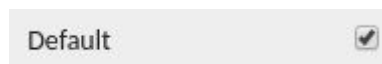
A screenshot of a user interface element. On the left, the text "Finish Time" is displayed in a light gray box. To its right is a white rectangular input field with a thin gray border, containing the text "22:00:00".

11. In the days of the week section, Select the checkboxes for the days of the week that the incoming chat will appear on the agent's screen, an example is displayed below:



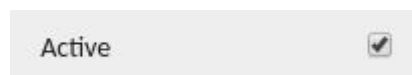
A screenshot of a user interface element. On the left, the text "Days of week" is displayed in a light gray box. To its right is a list of days of the week, each preceded by a checkbox. The checkboxes for Monday, Tuesday, Wednesday, Thursday, and Friday are checked, while the checkboxes for Saturday and Sunday are unchecked.

12. If the desired the "Default" box can be checked to allow the chat to make the following incoming chat rules the default:



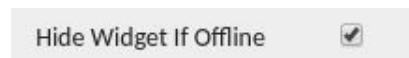
A screenshot of a user interface element. The text "Default" is displayed in a light gray box, followed by a checked checkbox.

13. Check the "Active" checkbox. The checkbox needs to be selected for the chat to be used as shown below:

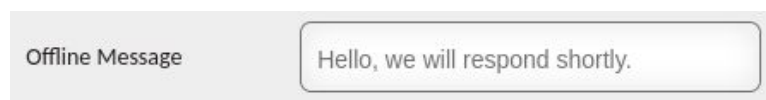



A screenshot of a user interface element. The text "Active" is displayed in a light gray box, followed by a checked checkbox.

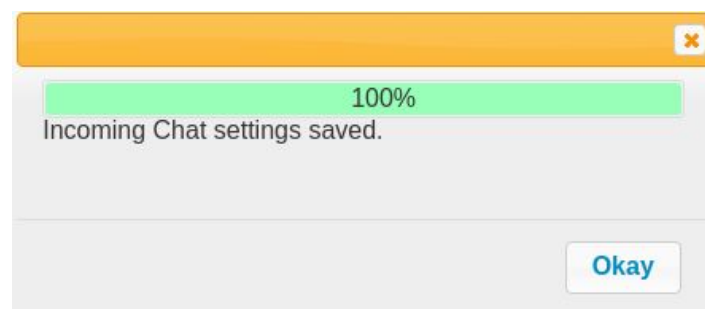
14. Check the “Hide Widget if Offline” checkbox to hide the incoming chat widget if offline. When the chat widget is embedded in a website, the chat icon will not appear for visitors if there are no available agents) as shown below:




15. Click the “Offline Message” input box (offline messages are only used if the “Hide Widget if Offline” checkbox is selected) type an offline message an example is shown below:




16. After all the desired additions have been made, click the save button,  , the following pop-up window will appear:



17. Click the Okay button,  , to acknowledge the addition. The new incoming chat will be located in the Incoming Chat list as seen below:

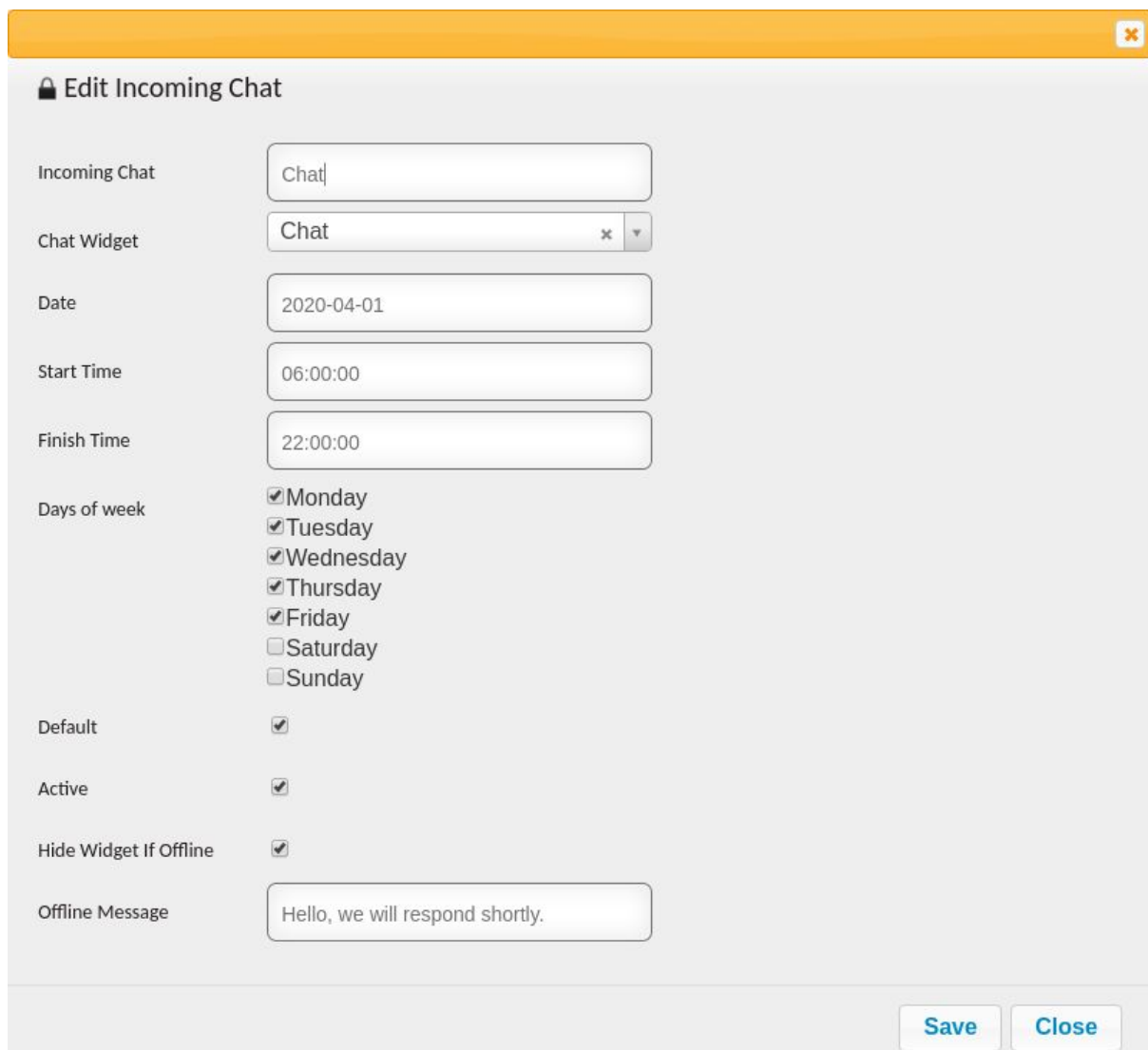


Editing an Incoming Chat

1. To edit an Incoming Chat, click the edit button, , located on the far right of the Incoming Chat Name after the “Active Column” as shown below:



After clicking the edit button, the incoming chat pop-up window will appear as shown:




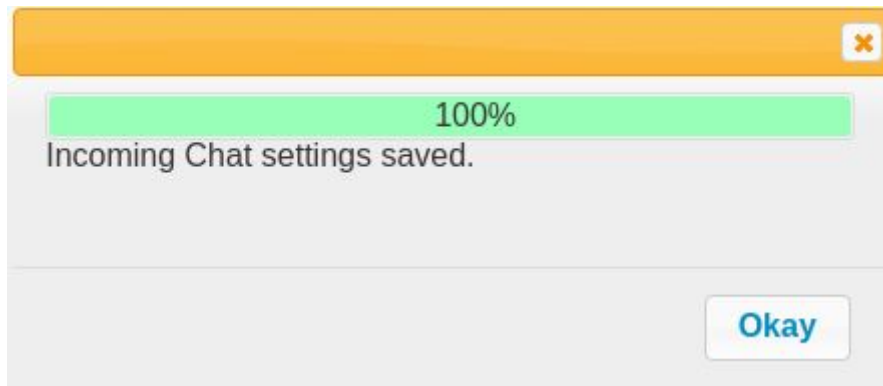
The 'Edit Incoming Chat' window contains the following fields and options:


- Incoming Chat:** Text input field containing 'Chat'.
- Chat Widget:** Dropdown menu showing 'Chat' with a close (x) and expand (v) button.
- Date:** Text input field containing '2020-04-01'.
- Start Time:** Text input field containing '06:00:00'.
- Finish Time:** Text input field containing '22:00:00'.
- Days of week:** List of days with checkboxes:
 - ☒ Monday
 - ☒ Tuesday
 - ☒ Wednesday
 - ☒ Thursday
 - ☒ Friday
 - ☐ Saturday
 - ☐ Sunday
- Default:** ☒
- Active:** ☒
- Hide Widget If Offline:** ☒
- Offline Message:** Text input field containing 'Hello, we will respond shortly.'

At the bottom right, there are two buttons: 'Save' and 'Close'.



-
2. Make changes as desired.
 3. Once the desired changes have been completed, the information can be saved by

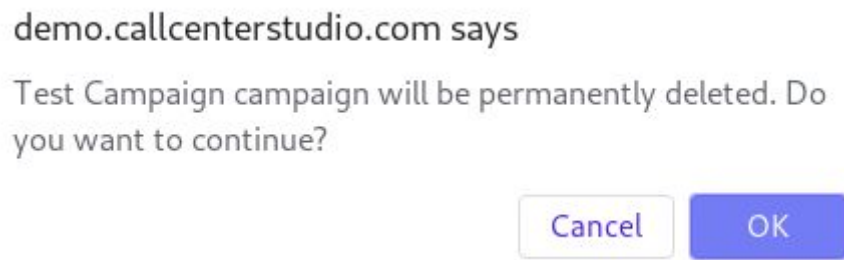
clicking the save button, , the following pop-up box will appear:





4. Click the Okay button, , to confirm the changes.

Deleting an Incoming Chat

1. From the Incoming Chat Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Searching for an Incoming Chat

1. Click the “Incoming Chat” input box, type the incoming chat’s name as shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the text "Incoming Chat" is displayed in a medium gray font. To the right of this text is a white rectangular input field with a thin gray border. Inside the input field, the word "Chat" is typed in a black font, and a vertical cursor is visible at the end of the word.


Note: Partial names can be used, when spelled correctly.

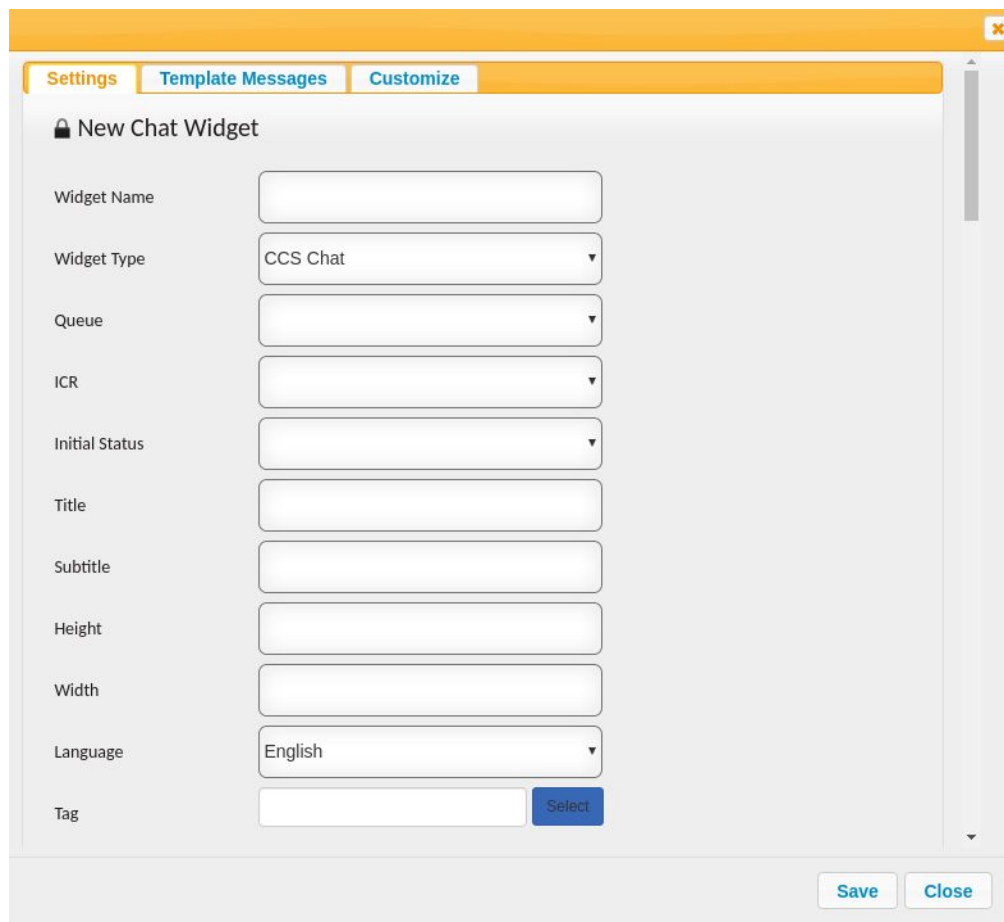
Chat Widgets



Creating a CCS Chat Widget (Settings Tab)

CCS chat widget is another name for creating a web chat widget.

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



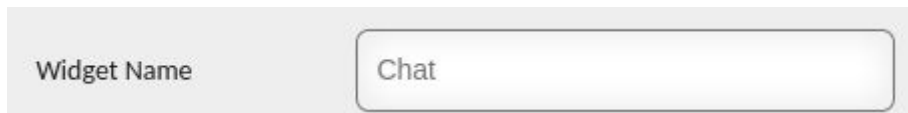
The screenshot shows a pop-up window titled "New Chat Widget" with a close button (X) in the top right corner. The window has three tabs: "Settings" (selected), "Template Messages", and "Customize". The form contains the following fields:

- Widget Name: Text input field
- Widget Type: Dropdown menu with "CCS Chat" selected
- Queue: Dropdown menu
- ICR: Dropdown menu
- Initial Status: Dropdown menu
- Title: Text input field
- Subtitle: Text input field
- Height: Text input field
- Width: Text input field
- Language: Dropdown menu with "English" selected
- Tag: Text input field with a "Select" button next to it

At the bottom right of the form are "Save" and "Close" buttons.

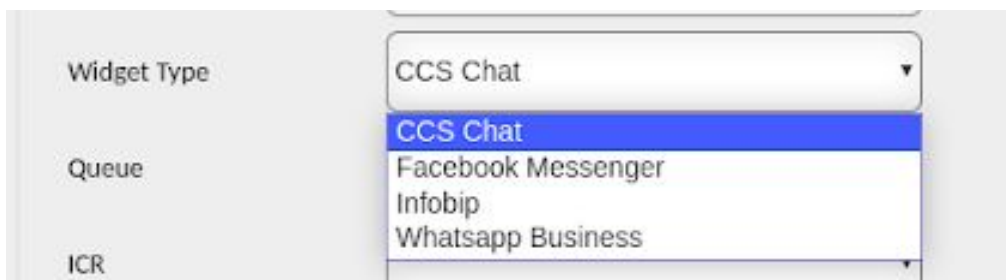
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name	Chat
-------------	------

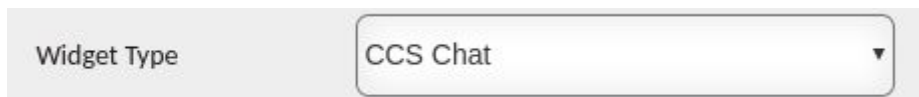
3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



Widget Type	CCS Chat
Queue	
ICR	

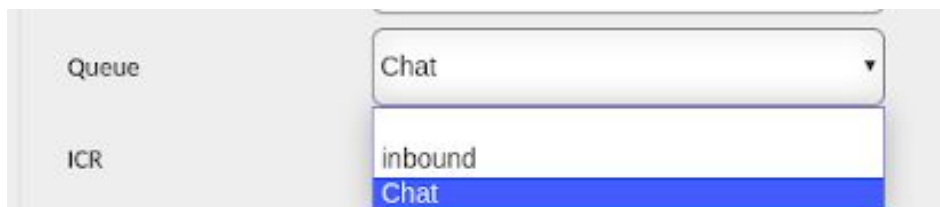
- CCS Chat
- Facebook Messenger
- Infobip
- Whatsapp Business

4. Select the “CCS Chat” widget from the dropdown list an example selection is shown below:



Widget Type	CCS Chat
-------------	----------

5. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



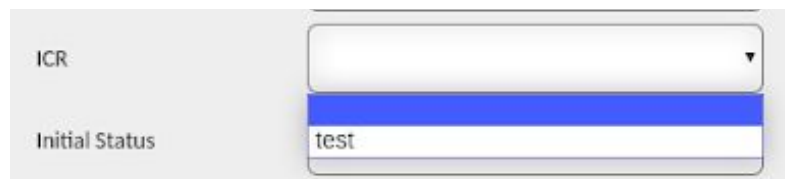
Queue	Chat
ICR	

- Chat
- inbound
- Chat

6. Select the desired queue from the dropdown list an example selection is shown below:

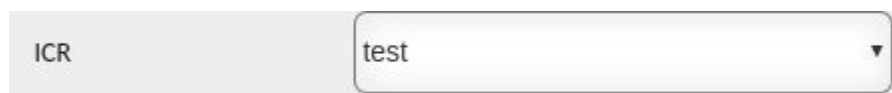
A screenshot of a user interface showing a label 'Queue' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'Chat' and a downward-pointing arrow.

7. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below :

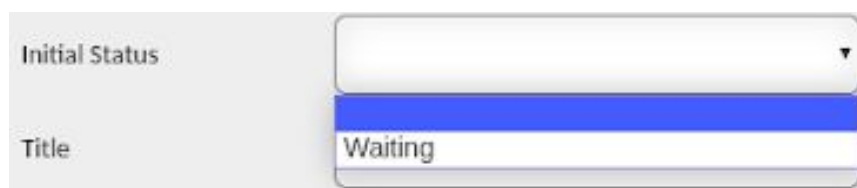
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'test' selected and highlighted in blue. Below the dropdown, the label 'Initial Status' is visible.

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

8. Select an ICR from the dropdown list, if desired. An example selection is shown below:

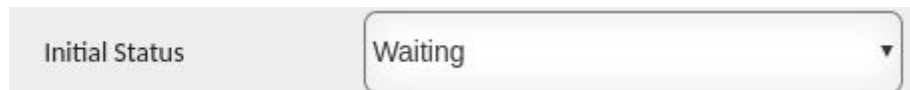
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying the selected option 'test' and a downward-pointing arrow.

9. Click the “Initial Status” input box a dropdown menu will appear. An example is shown below:

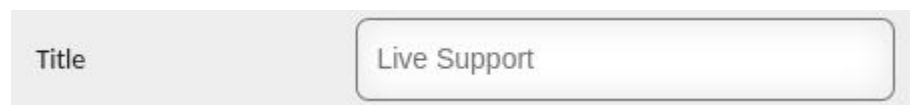
A screenshot of a user interface showing a label 'Initial Status' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'Waiting' selected and highlighted in blue. Below the dropdown, the label 'Title' is visible.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

10. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

A screenshot of a form element. On the left, a light gray rectangular box contains the text "Initial Status". To its right is a white rectangular dropdown menu with a thin gray border. The menu is open, showing the text "Waiting" and a small downward-pointing triangle on the right side.

11. Click the “Title” input box, type a name for the Chat (Customer will be able to see the title when using webchat only) an example is shown below:

A screenshot of a form element. On the left, a light gray rectangular box contains the text "Title". To its right is a white rectangular input box with a thin gray border, containing the text "Live Support".

12. Click the “Subtitle” input box, type a name for the subtitle of the chat (can be the same as the chat title) an example is shown below:

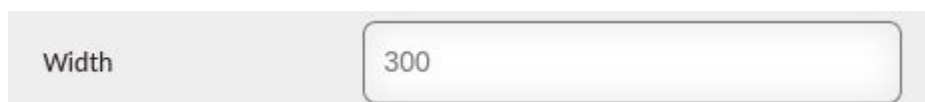
A screenshot of a form element. On the left, a light gray rectangular box contains the text "Subtitle". To its right is a white rectangular input box with a thin gray border, containing the text "Live Support".

Note: A subtitle needs to be entered to create the chat widget.

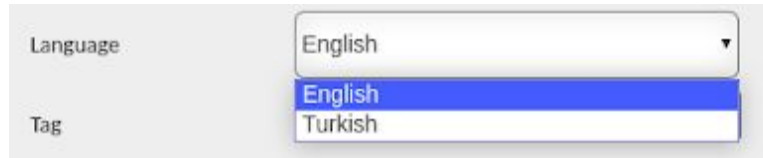
13. Click the “Height” input box type the desired height (Pixels) of the chat window.
An example is shown below:

A screenshot of a form element. On the left, a light gray rectangular box contains the text "Height". To its right is a white rectangular input box with a thin gray border, containing the text "300".

14. Click the “Width” input box type the desired width (Pixels) of the chat window.
An example is shown below:


A screenshot of a form element. On the left, a light gray rectangular box contains the text "Width". To its right is a white rectangular input box with a thin gray border, containing the text "300".

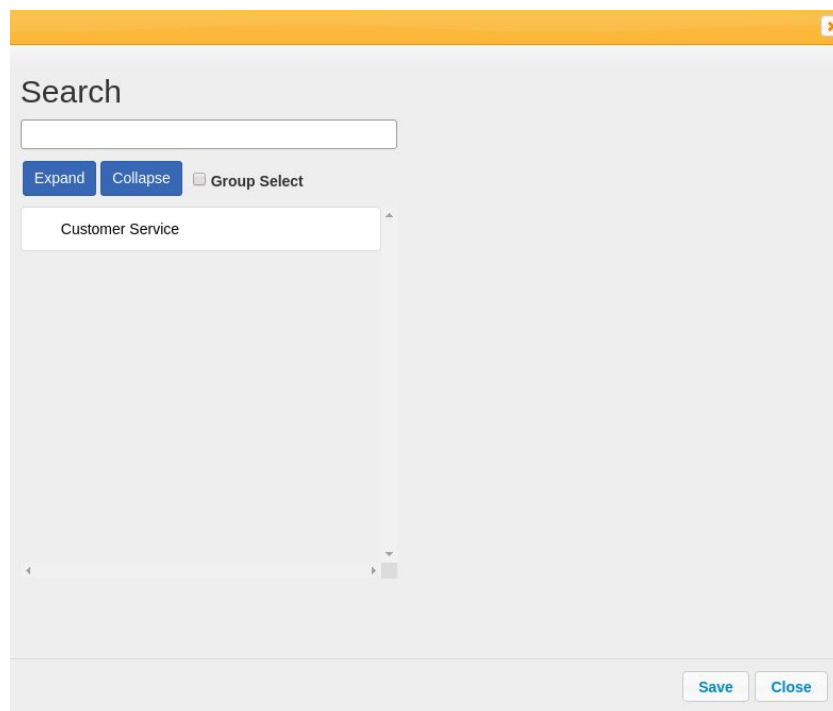
15. Click the “Language” input box. A dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

A screenshot of a web form with two input fields: "Language" and "Tag". The "Language" field is a dropdown menu with "English" selected. A dropdown list is open, showing "English" and "Turkish" as options.

16. Select the desired language from the dropdown list. An example is shown below:

A screenshot of the "Language" input field. The dropdown menu is closed, and "English" is displayed as the selected value.

17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

A screenshot of a "Search" pop-up window. It has a search bar at the top. Below it are buttons for "Expand", "Collapse", and a checkbox for "Group Select". A list of search results is shown, with "Customer Service" selected. At the bottom right are "Save" and "Close" buttons.

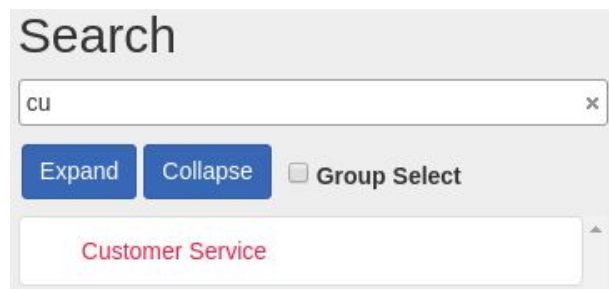
*Note: Only Tags made available for the chat can be viewed here (See **Tag** Section)*

18. Search for a Tag using the “Search” input box shown below:




A search input box with the label "Search" above it. The input field is empty and has a light gray border.


Note: Partial Tag names can be used for searching purposes. All Tags with the partial name will have their name appear in red font as shown below:



A search interface showing the results for the search term "CU". The input box contains "CU" and a clear button (X). Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". The search results are displayed in a list box, showing "Customer Service" in red text.

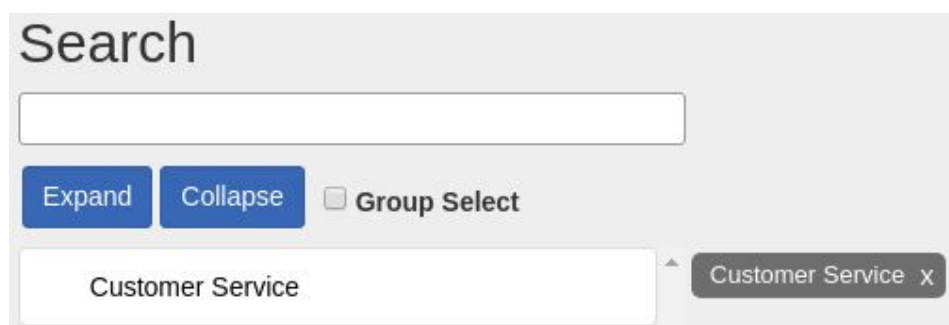
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)

Check the Group Select Checkbox, , to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

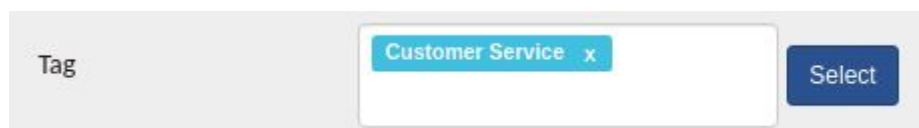


A search interface showing the results for the search term "Customer Service". The input box is empty. Below the input box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". The search results are displayed in a list box, showing "Customer Service" in black text. To the right of the list box, the selected tag "Customer Service" is displayed with a clear button (X).

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Once the desired Tag selections have been selected, they can be viewed to the right

of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



The image shows a 'Tag' input box with the text 'Customer Service' and a small 'x' icon to its right. To the right of the input box is a blue 'Select' button.

20. Click the “Support Email” type the desired support email. An example is shown below:

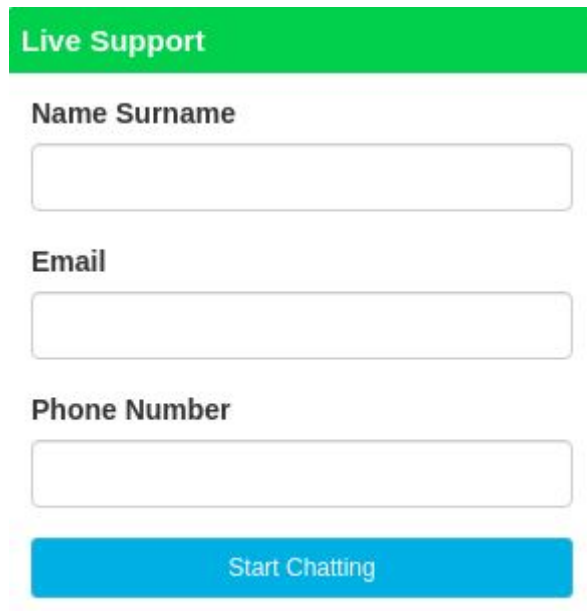


The image shows a 'Support E-Mail' input field with the text 'johnsmith@johnscallcenter.com' entered.

21. Following the Support Email input box, there are three checkbox selections outlined below to select the desired checkboxes:

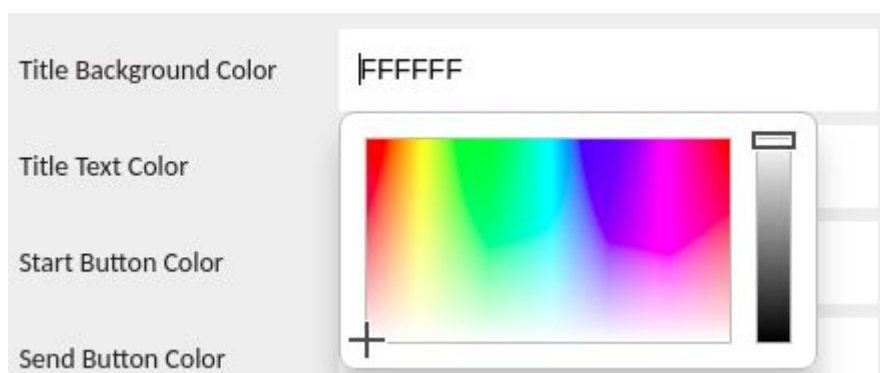
<p>Email Optional <input type="checkbox"/></p>	<p>Makes the email input field optional when a customer starts a chat (See example below).</p>
<p>Phone Optional <input type="checkbox"/></p>	<p>Makes the phone number input field optional when a customer starts a chat (See example below).</p>
<p>Show Ended Chats on the Agent Screen. <input type="checkbox"/></p>	<p>Shows the ended chat on the agent screen.</p>

Below is an example chat window: If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:



The image shows a chat widget interface. At the top is a green header bar with the text "Live Support" in white. Below the header are three input fields: "Name Surname", "Email", and "Phone Number". Each field is a simple white rectangle with a thin grey border. At the bottom of the form is a blue button with the text "Start Chatting" in white.

22. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

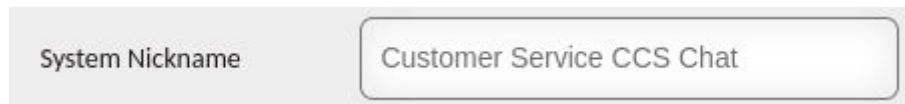
23. Select the desired custom color an example selection is shown below:



24. Click the “Title Text Color” input box, repeat steps 20 -21.
25. Click the “Start button Color” input box, repeat steps 20-21.
26. Click the “Send button Color” input box, repeat steps 20-21.
27. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

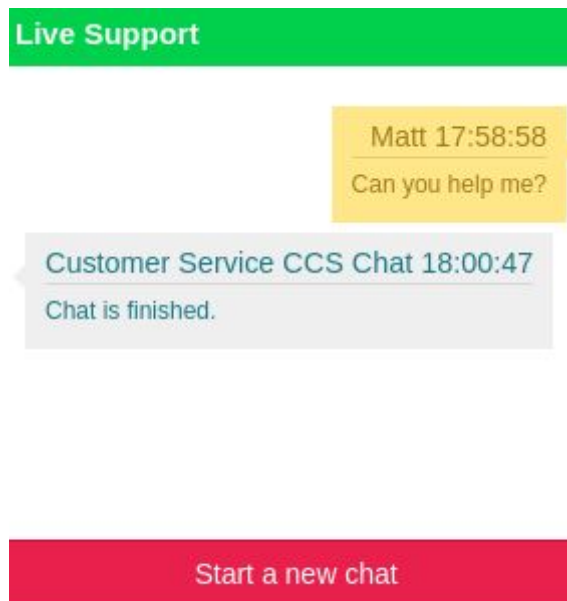


28. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:



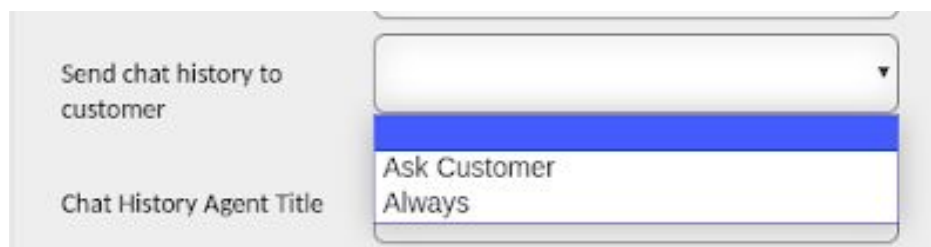
A screenshot of a chat widget configuration interface. It shows a label "System Nickname" next to a text input box containing the text "Customer Service CCS Chat".

The system nickname is shown at the top of each message sent an example is shown below:



A screenshot of a chat widget interface. At the top is a green bar with the text "Live Support". Below it is a yellow message bubble from "Matt 17:58:58" with the text "Can you help me?". Below that is a grey message bubble from "Customer Service CCS Chat 18:00:47" with the text "Chat is finished.". At the bottom is a red button with the text "Start a new chat".

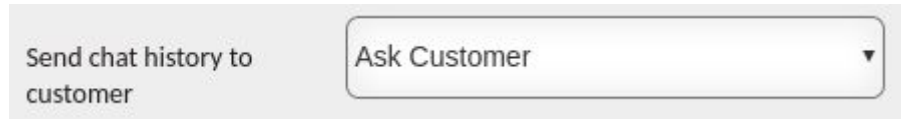
29. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



A screenshot of a chat widget configuration interface. It shows a label "Send chat history to customer" next to a dropdown menu. The dropdown menu is open, showing two options: "Ask Customer" and "Always". Below the dropdown is a label "Chat History Agent Title".

Note: the selection can also be left blank.


30. Select the desired option; an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a light gray background and a thin border. The menu is open, showing the selected option "Ask Customer" in a dark font, with a small downward-pointing triangle on the right side of the menu box.

31. Click “Chat History Agent Title”, type a title an example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a light gray background and a thin border. The field contains the text "Agent" in a dark font.

Note: This screenshot has been taken from the Chat Record in the Quality Control using the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. It features a light gray background with a thin border. At the top, the text "John Smith - Queue - 2020-07-07 19:35:44" is displayed in a teal font. Below this text is a horizontal line. Under the line, the text "How can I help you?" is displayed in a teal font.

32. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

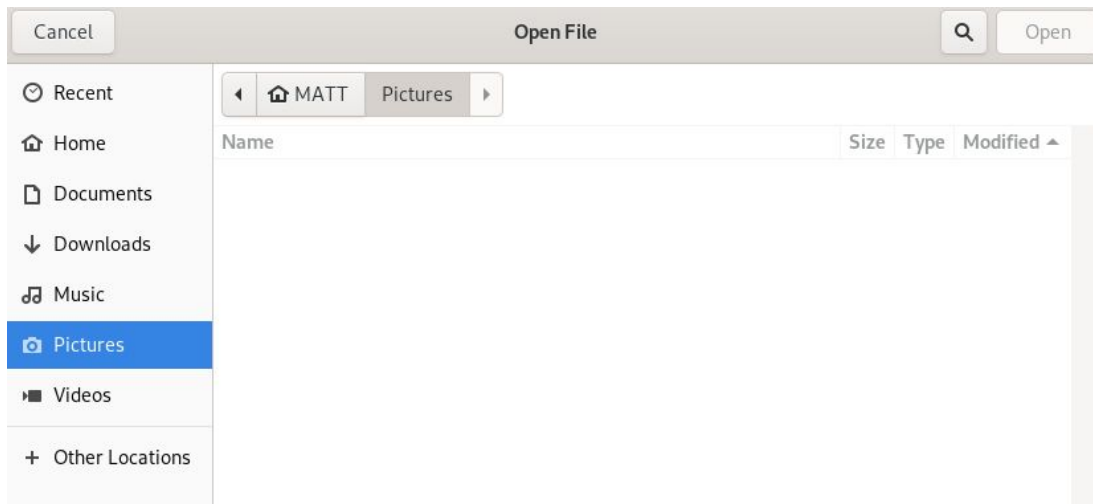


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

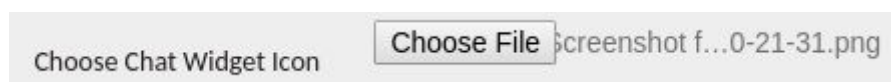
33. Select the desired widget version an example selection is shown below:



34. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



35. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:






36. Next to the “Auto Finish” checkbox, check auto finish if desired to auto finish the chat, the checked “Auto Finish” checkbox is shown below:



37. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:



38. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

Note: Parking is used by the agent to transfer the customer to the queue, put the customer on hold, or transfer the agent to an IVR as described above. The agent must know what parking means for each chat widget.

39. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
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40. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
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41. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

42. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
--------------------	--

43. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	<div>A customer service agent will be with you shortly.</div>
---------------	---

44. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	<div>Goodbye!</div>
---------------------	---------------------

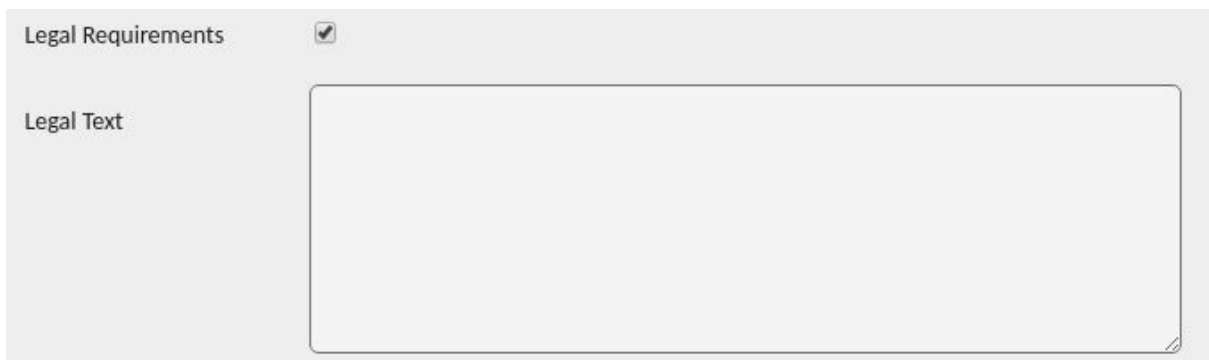
45. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

A screenshot of a user interface element. On the left, there is a label 'Transfer Message'. To its right is a large, empty rectangular text input box with a light gray border and a small cursor icon at the bottom right corner.

46. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:

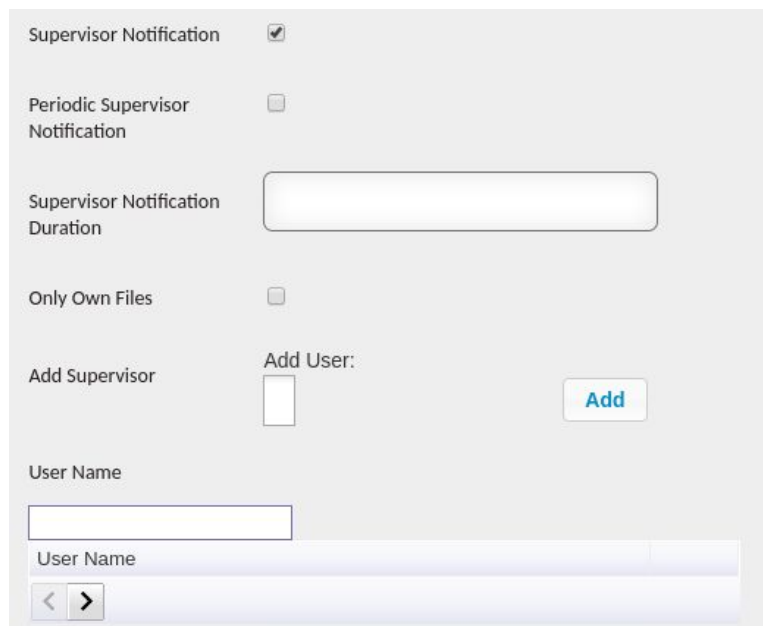
A screenshot of a user interface element. On the left, there is a label 'Auto Finish Message Duration'. To its right is a rectangular text input box containing the number '180'.

47. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

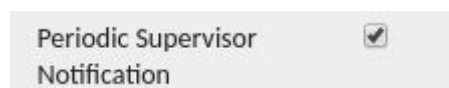
A screenshot of a user interface element. At the top, there is a label 'Legal Requirements' followed by a checked checkbox. Below this, on the left, is a label 'Legal Text'. To the right of the 'Legal Text' label is a large, empty rectangular text input box with a light gray border and a small cursor icon at the bottom right corner.

48. If desired in the “Legal Text” input box type the desired legal text.

49. If supervisor notifications are desired for the chat, check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



50. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



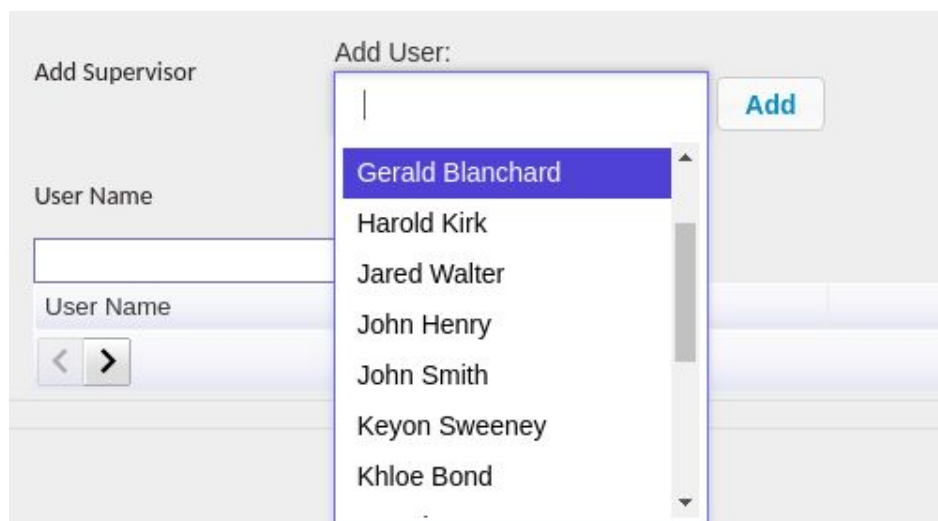
51. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:




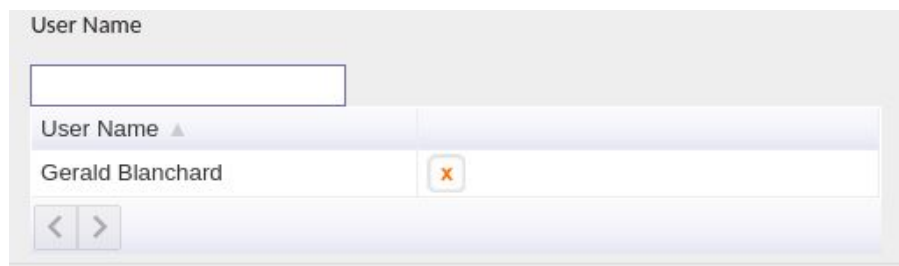
52. Check the “Only Own Files” checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):





53. Click the “Add Supervisor” input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:

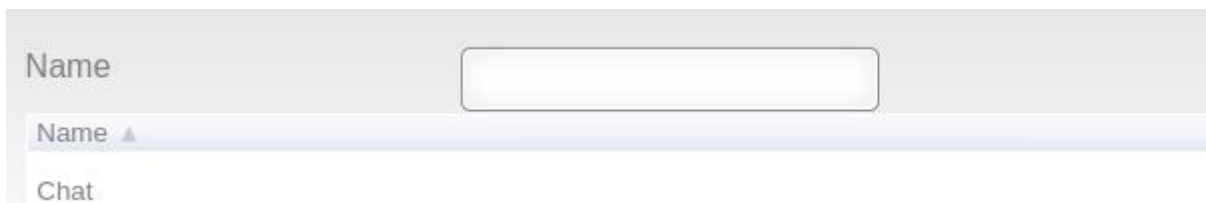


54. Select the desired Supervisor and click the add button, .
55. The supervisor’s name will appear in the “User Name” field an image of this field is shown below:




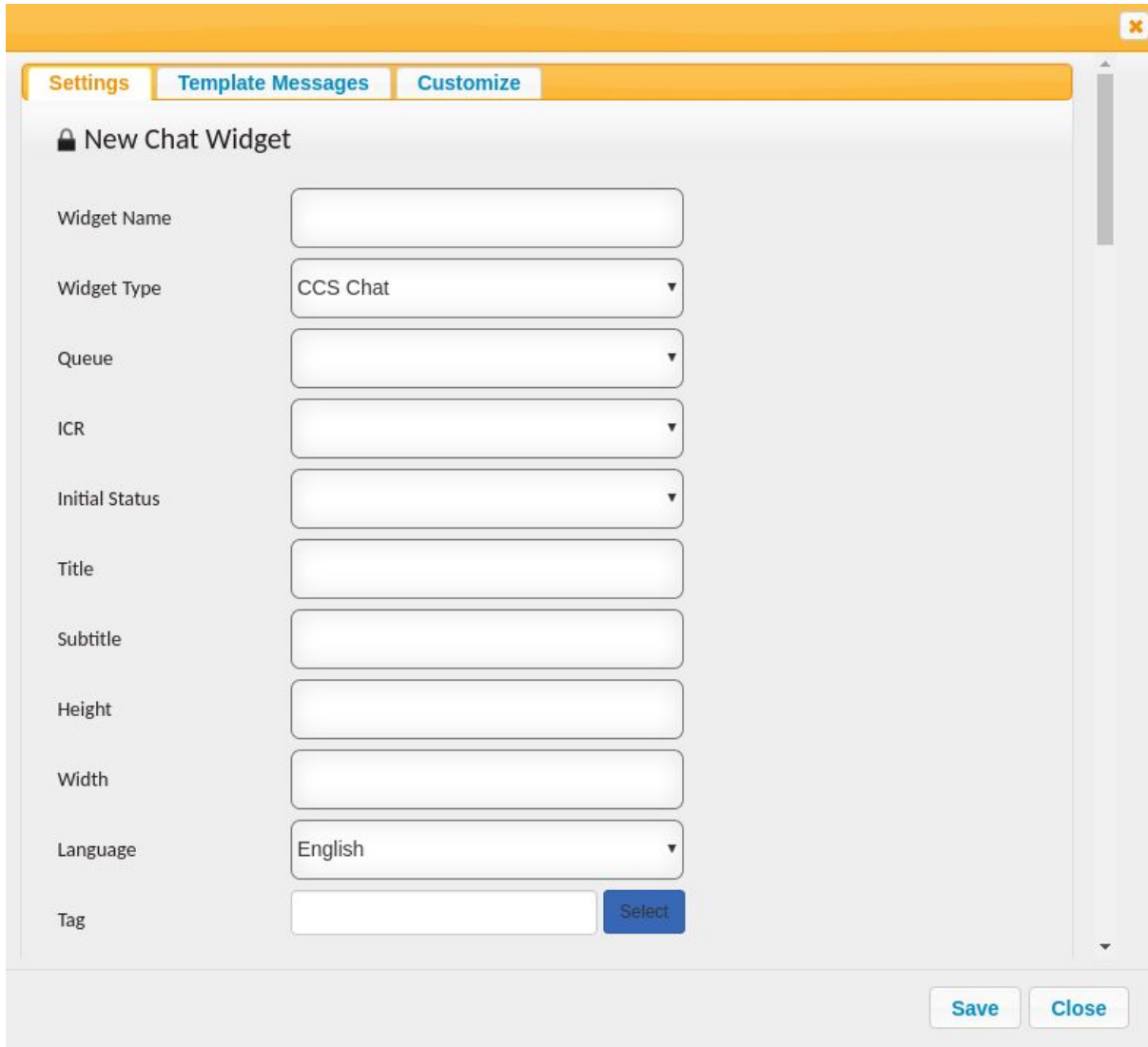
Note: To delete a supervisor, click the delete button,  , located to the right of the supervisor's name.

56. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button,  , the created CCS chat can be viewed in the chat widget name list as shown below:

A screenshot of a web interface for managing chat widgets. It features a table with two columns: "Name" and "Chat". The "Name" column has a dropdown menu currently showing "Name ▲". The "Chat" column is currently empty. There is a text input field above the table, likely for filtering or searching.

Creating a Facebook Messenger Chat Widget (Settings Tab)

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



Settings | **Template Messages** | **Customize**

New Chat Widget

Widget Name

Widget Type

Queue

ICR

Initial Status

Title

Subtitle

Height

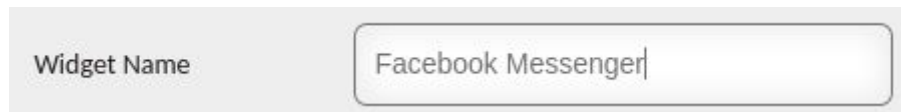
Width

Language

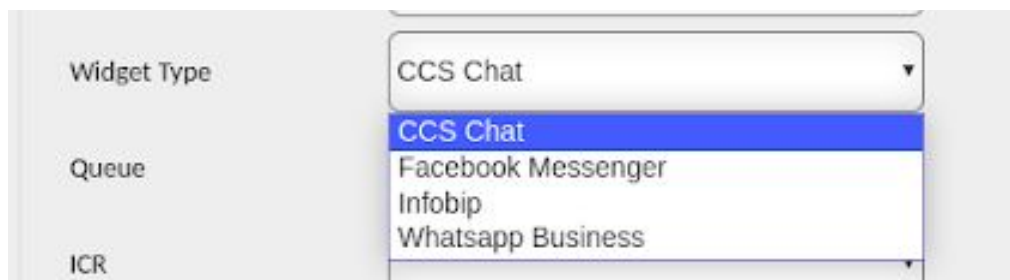
Tag

Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:

A screenshot of a form field labeled "Widget Name". The input box contains the text "Facebook Messenger".

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:

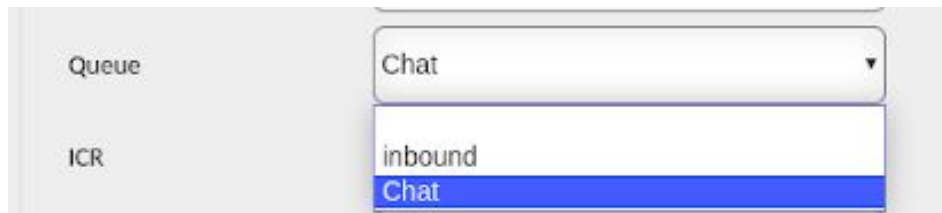
A screenshot of a form field labeled "Widget Type". A dropdown menu is open, showing a list of options: "CCS Chat", "Facebook Messenger", "Infobip", and "Whatsapp Business". The "CCS Chat" option is currently selected and highlighted in blue.

4. Select the “Facebook Messenger” Chat widget from the dropdown list an example selection is shown below:

A screenshot of a form field labeled "Widget Type". The dropdown menu is closed, and the text "Facebook Messenger" is displayed in the input box.

5. Click the “Verify Token” input box, type the verify token (can be any parameter desired, such as a password, company, etc. It will be used on the Facebook developer screen).
6. Click the “Page Access Token” input box, type the page access token. This token is generated automatically by Facebook. It is obtained by selecting the appropriate pages on Call Center Studio and on Facebook desired to be linked together.

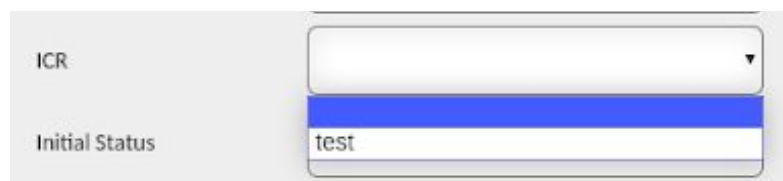
- Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



- Select the desired queue from the dropdown list an example selection is shown below:

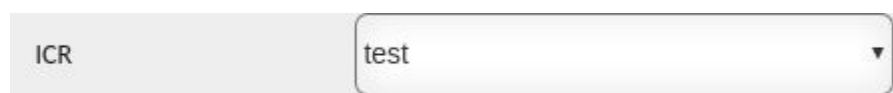


- Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

- Select an ICR from the dropdown list if desired an example selection is shown below:

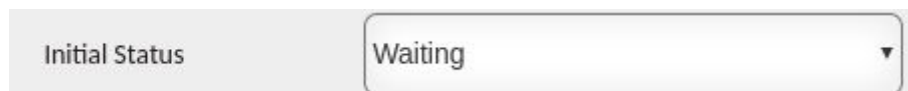


11. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:

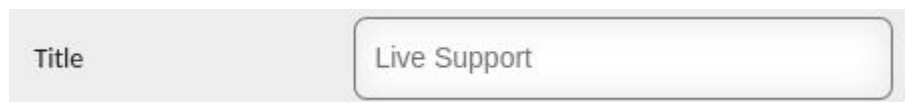
A screenshot of a form with two labels: 'Initial Status' and 'Title'. The 'Initial Status' label is positioned above a dropdown menu that is open, showing a list of options. The first option, 'Waiting', is highlighted with a blue background. The 'Title' label is positioned below the 'Initial Status' label.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

12. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

A screenshot of a form with two labels: 'Initial Status' and 'Title'. The 'Initial Status' label is positioned above a dropdown menu that is closed, showing the selected value 'Waiting'. The 'Title' label is positioned below the 'Initial Status' label.

13. Click the “Title” input box, type a name for the Chat (Customer will be able to see) an example is shown below:

A screenshot of a form with two labels: 'Title' and 'Initial Status'. The 'Title' label is positioned above a text input box that contains the text 'Live Support'. The 'Initial Status' label is positioned to the right of the 'Title' label.


14. Click the “Subtitle” input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:

A screenshot of a form with two labels: 'Subtitle' and 'Initial Status'. The 'Subtitle' label is positioned above a text input box that contains the text 'Live Support'. The 'Initial Status' label is positioned to the right of the 'Subtitle' label.

15. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

A screenshot of a form with two labels: 'Height' and 'Initial Status'. The 'Height' label is positioned above a text input box that contains the text '300'. The 'Initial Status' label is positioned to the right of the 'Height' label.

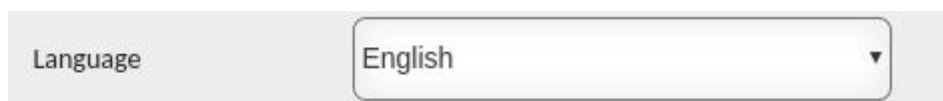
-
16. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:


A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the word "Width" is written in a dark gray font. To the right of "Width" is a white input field with a thin gray border. Inside the input field, the number "300" is displayed in a dark gray font.

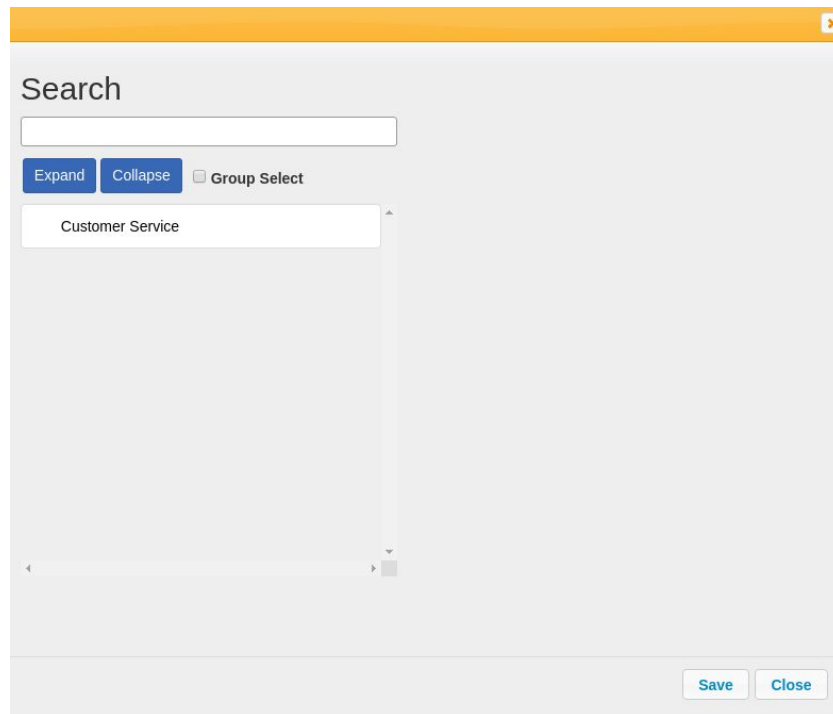
17. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

A screenshot of a user interface element. It shows a light gray rectangular box. On the left side, the word "Language" is written in a dark gray font. To the right of "Language" is a dropdown menu. The dropdown menu is currently open, showing a list of two options: "English" and "Turkish". The "English" option is highlighted with a blue background. To the left of the dropdown menu, the word "Tag" is written in a dark gray font.

18. Select the desired language from the dropdown list. An example is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular box. On the left side of the box, the word "Language" is written in a dark gray font. To the right of "Language" is a white dropdown menu with a thin gray border. Inside the dropdown menu, the word "English" is displayed in a dark gray font. A small downward-pointing triangle is visible on the right side of the dropdown menu.

19. If desired tags can be added, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

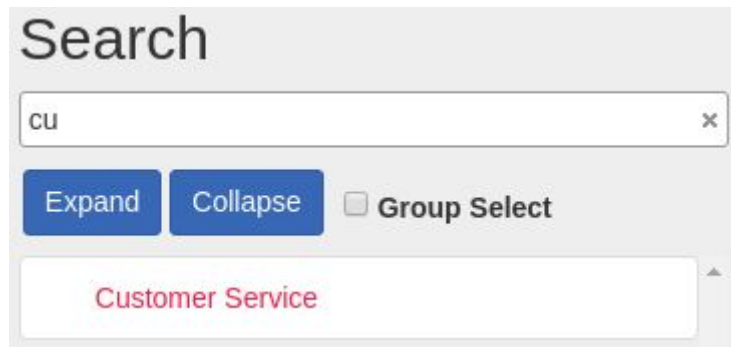


*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*

20. Search for a Tag using the “Search” input box shown below:

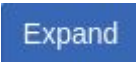



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

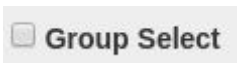


A screenshot of a search widget titled "Search". It features a search input field containing the text "cu" with a clear button (X) on the right. Below the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". At the bottom, a list of search results is shown, with "Customer Service" highlighted in red text.

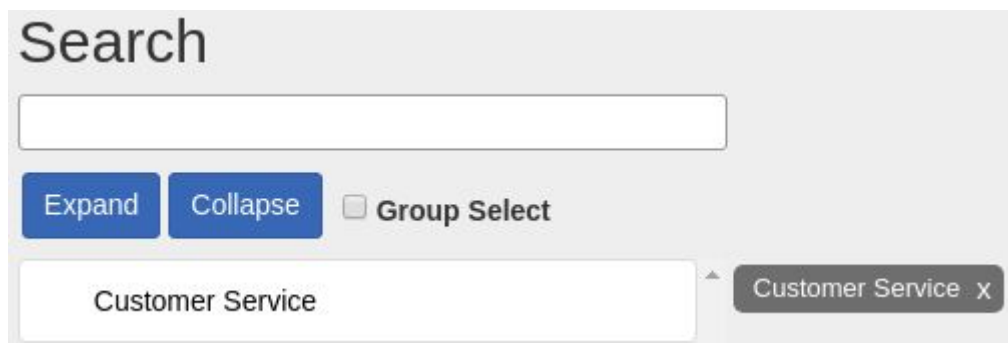
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)

Check the Group Select Checkbox, , to group select tags

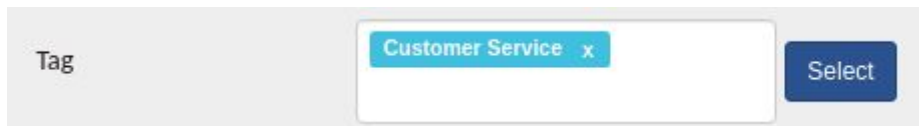
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



A screenshot of the search widget showing a selected tag. The search input field is empty. The "Expand" and "Collapse" buttons are present, along with the "Group Select" checkbox. The list of results shows "Customer Service" in black text. To the right of the list, a grey button with the text "Customer Service" and a clear button (X) is visible.

Note: To delete a Tag from the selection simply click the "X," , to the right of the tag name.

21. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box. Click the save button, **Save**. The “Tag” input box with an example selection is shown below:



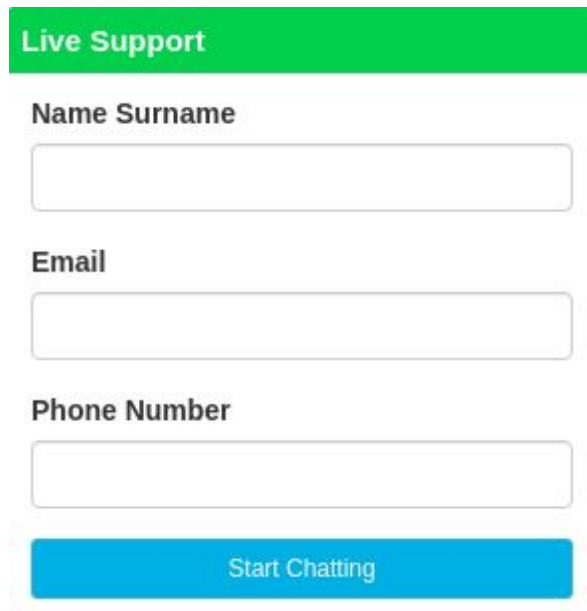
22. Click the “Support Email” type the desired support email. An example is shown below:



23. Following the Support Email input box, there are three checkbox selections outlined below select the desired checkboxes:

<p>Email Optional <input type="checkbox"/></p>	<p>Makes the email input field optional when a customer starts a chat (See example below).</p>
<p>Phone Optional <input type="checkbox"/></p>	<p>Makes the phone number input field optional when a customer starts a chat (See example below).</p>
<p>Show Ended Chats on the Agent Screen. <input type="checkbox"/></p>	<p>Shows the ended chat on the agent screen.</p>

Below is an example chat window: If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:

A screenshot of a chat widget form. It has a green header bar with the text "Live Support". Below the header are three input fields: "Name Surname", "Email", and "Phone Number". At the bottom is a blue button labeled "Start Chatting".

Live Support

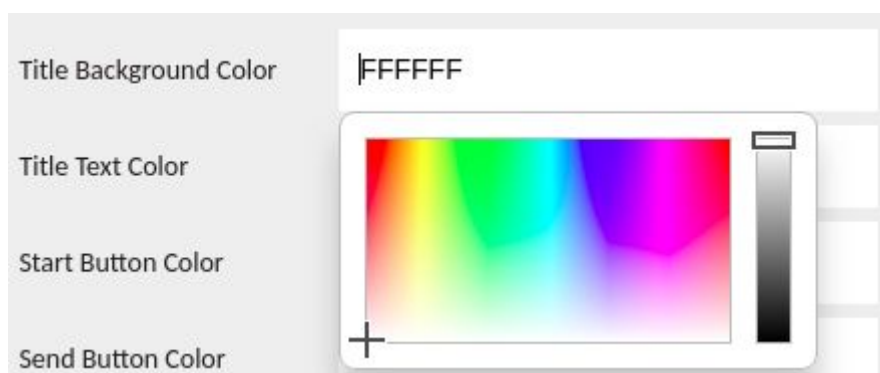
Name Surname

Email

Phone Number

Start Chatting

24. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

25. Select the desired custom color an example selection is shown below:

Title Background Color	<input type="text" value="466DFF"/>
------------------------	-------------------------------------

26. Click the “Title Text Color” input box, repeat steps 20 -21.

27. Click the “Start button Color” input box, repeat steps 20-21.

28. Click the “Send button Color” input box, repeat steps 20-21.

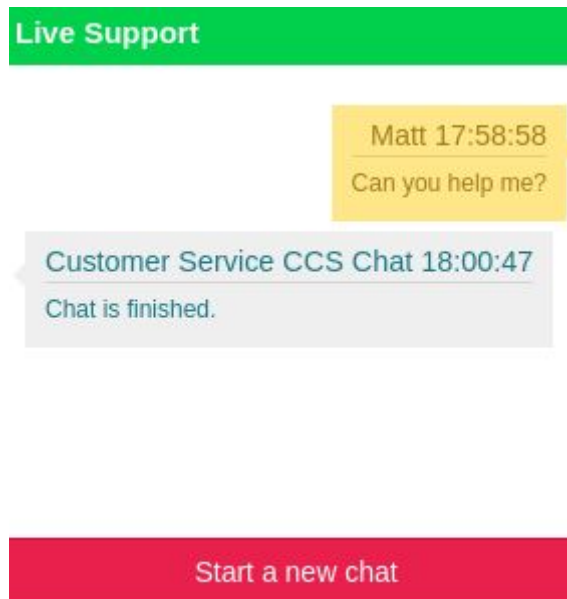
29. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

Title Background Color	<input type="text" value="466DFF"/>
Title Text Color	<input type="text" value="67FF98"/>
Start Button Color	<input type="text" value="FF4365"/>
Send Button Color	<input type="text" value="FFF365"/>
Logout Button Color	<input type="text" value="000000"/>

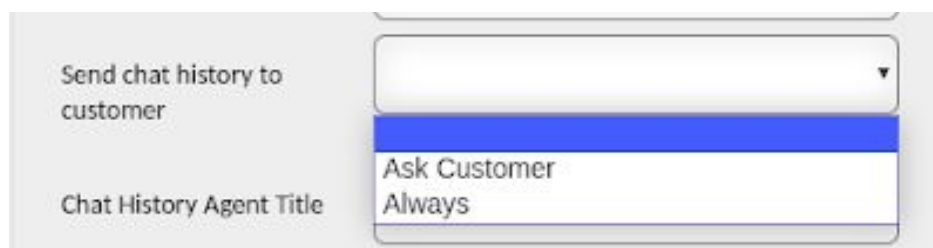
30. Click the “System Nickname” input box, if desired, type a system nickname the example is shown below:

System Nickname	<input type="text" value="Customer Service CCS Chat"/>
-----------------	--

The system nickname is shown at the top of each message sent an example is shown below:

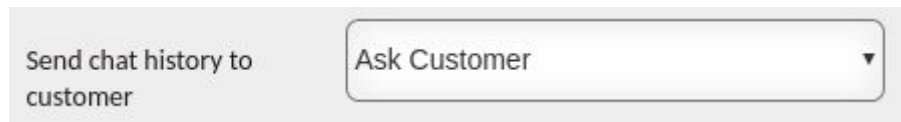


31. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



Note: the selection can also be left blank

32. Select the desired option, an example selection is shown below:



A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing the selected option "Ask Customer" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

33. Click “Chat History Agent Title”, type a title an example is shown below:



A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a white background and a thin grey border. The field contains the text "Agent" in a dark grey font.

Note: This screenshot has been taken from the Chat Record in Quality Control using the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:



34. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



A screenshot of a user interface element. On the left, the text "Widget Versions" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently open, showing a list of options: "Version 1", "Version 1", "Version 2", and "Customize". The first "Version 1" option is highlighted with a blue background. A small downward-pointing triangle is visible on the right side of the dropdown box.

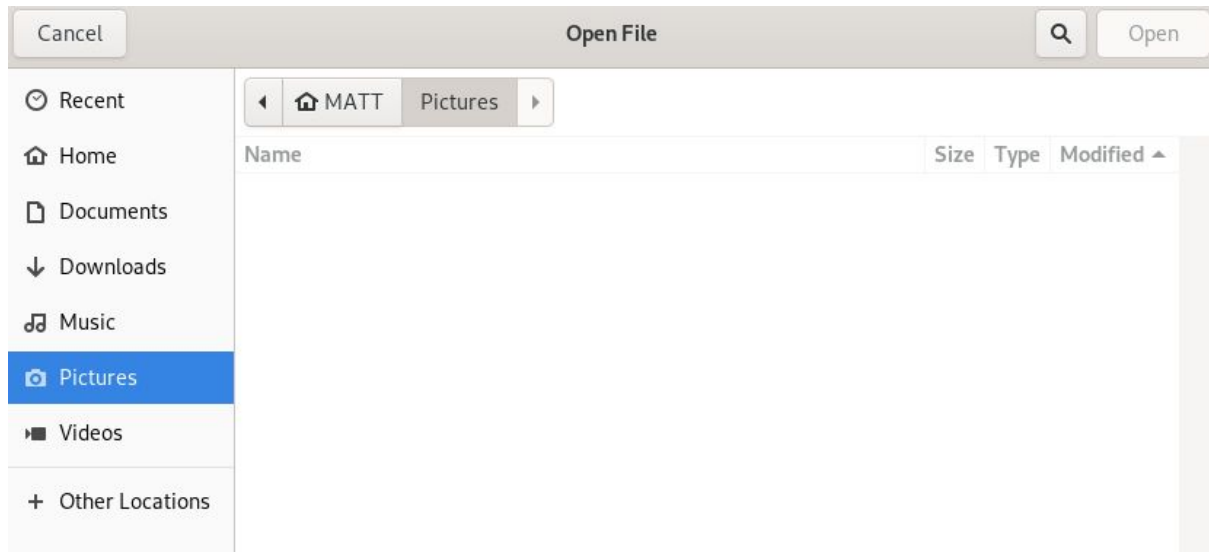
35. Select the desired widget version an example selection is shown below:



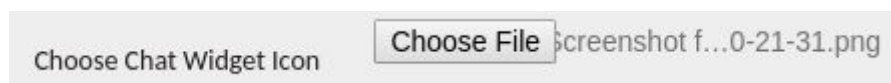
A screenshot of a user interface element. On the left, the text "Widget Versions" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is currently closed, showing the selected option "Version 1" in a dark grey font. A small downward-pointing triangle is visible on the right side of the dropdown box.

36. To the left of the title “Chose Chat Widget Icon,” click the choose file button,

Choose File, to create a custom chat icon from saved photos on the device used. A pop-up window will appear showing the saved files as shown below:



37. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:






38. Check the “Auto Finish checkbox”, if desired (Ends the chat after no activity after the auto finish duration), the checked “Auto Finish” checkbox is shown below:



39. In the “Auto Finish Duration” input box, type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame (seconds) is shown below:



40. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold, agents can answer other chats, but when the customer responds, the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

-
41. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
-------------------------	--

42. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

43. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

44. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	The agent has left the chat. A new agent will join shortly.
--------------------	---

45. In the “Queue Message” input box, type a queue message for the chat, if desired. An example is shown below (Agent and customer will be able to view message once the customer is transferred to a queue):

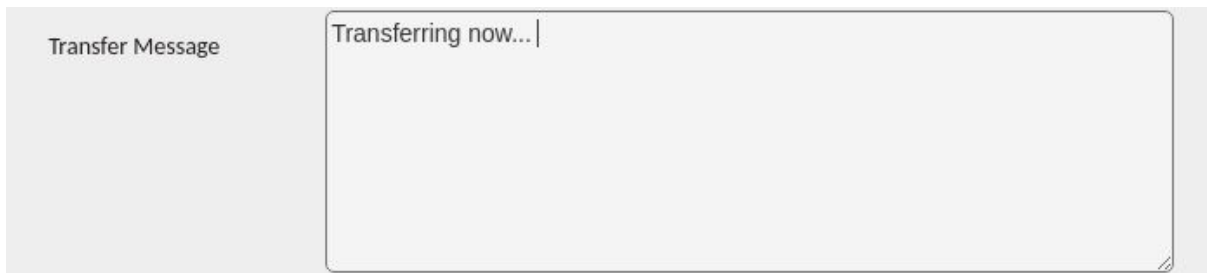
Queue Message	A customer service agent will be with you shortly.
---------------	--

46. In the “Auto Finish Message” input box, type an auto finish message for the chat, if desired. An example is shown below (this message will be displayed after no activity during the auto finish message duration):

Auto Finish Message	Goodbye!
---------------------	----------

47. In the “Transfer Message” input box, type a transfer message for the chat if desired.

An example is shown below:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Transfer Message'. To its right is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner.

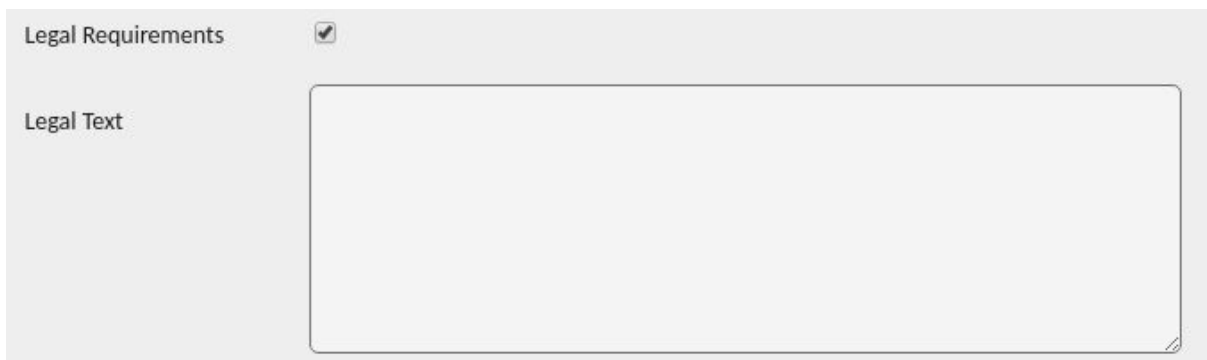
48. In the “Auto Finish Duration” input box, type a time duration (seconds) for the chat to

Auto Finish if desired an example is shown below:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Auto Finish Message Duration'. To its right is a text input box containing the number '180'.

49. If a legal message is desired in the chat check the checkbox entitled “Legal

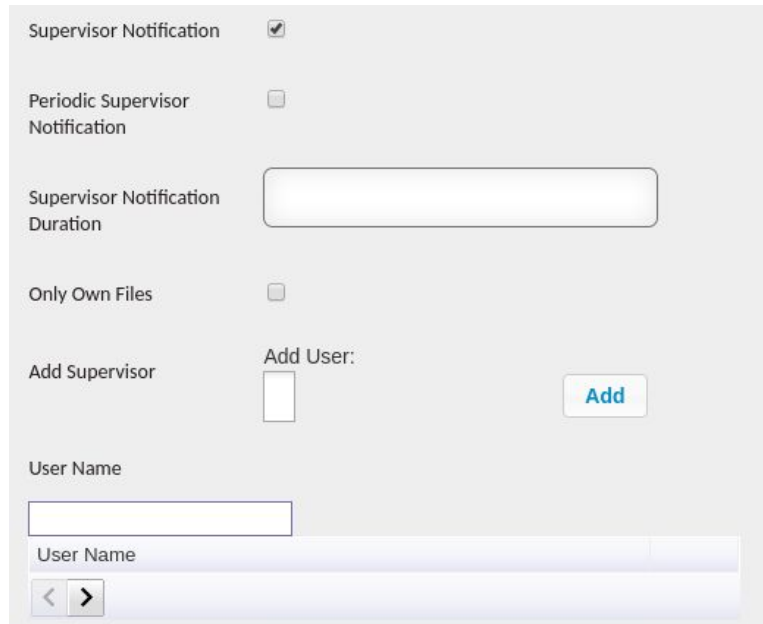
Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

A screenshot of a configuration panel for a chat widget. On the left, there is a label 'Legal Requirements' next to a checked checkbox. Below this, there is a label 'Legal Text'. To the right of the 'Legal Text' label is a large, empty text input box with a light gray border and a small cursor icon at the bottom right corner.

50. If desired, in the “Legal Text” input box type the desired legal text.

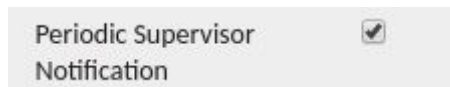
51. If supervisor notifications are desired for the chat check the checkbox entitled

“Supervisor Notification,” when the box is checked, the following will be displayed:




The screenshot shows a settings panel for supervisor notifications. It includes a checked checkbox for "Supervisor Notification", an unchecked checkbox for "Periodic Supervisor Notification", a text input field for "Supervisor Notification Duration", an unchecked checkbox for "Only Own Files", and an "Add Supervisor" section with an "Add User:" label, a small input field, and an "Add" button. At the bottom, there is a "User Name" label and a list of users with a scroll bar.

52. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



The screenshot shows a single checkbox labeled "Periodic Supervisor Notification" which is checked.

53. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration (seconds) an example is displayed below:



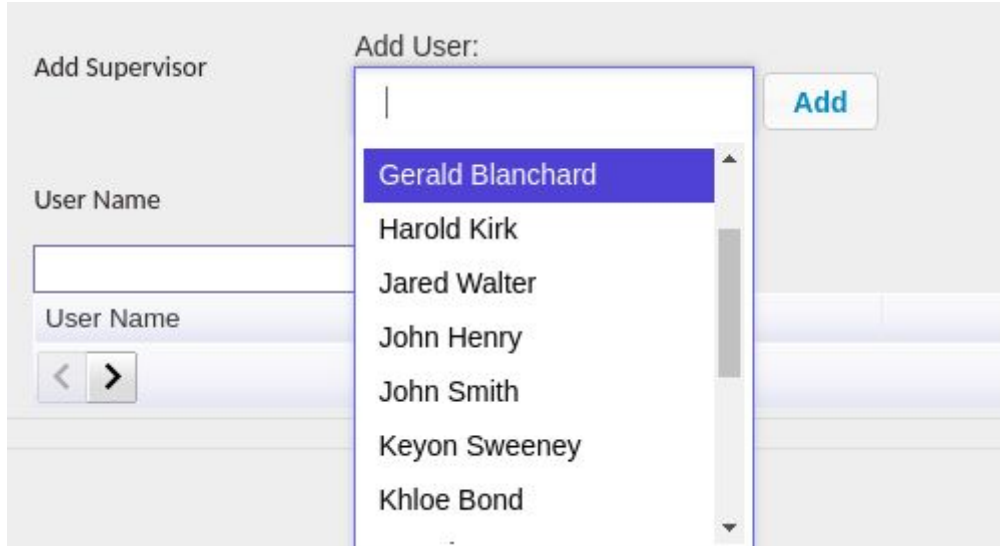
The image shows a form field labeled "Supervisor Notification Duration" with a text input box containing the value "180".

54. Check the “Only Own Files” checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):




The image shows a checkbox labeled "Only Own Files" which is checked.

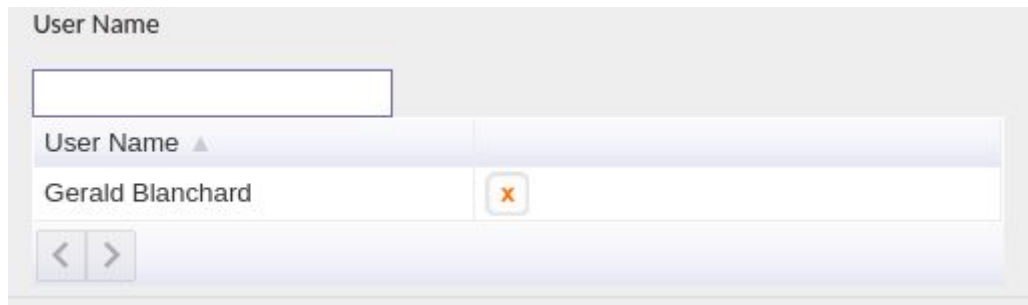
55. Click the “Add Supervisor” input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:



The image shows a form with a section titled "Add Supervisor". It includes a "User Name" input box and a dropdown list. The dropdown list is open, showing a list of names: Gerald Blanchard, Harold Kirk, Jared Walter, John Henry, John Smith, Keyon Sweeney, and Khloe Bond. The name "Gerald Blanchard" is highlighted. To the right of the dropdown list is an "Add" button.

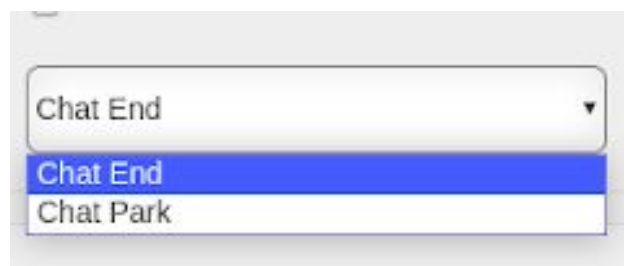
56. Select the desired Supervisor and click the add button, .

57. The supervisor's name will appear in the "User Name" field an image of this field is shown below:




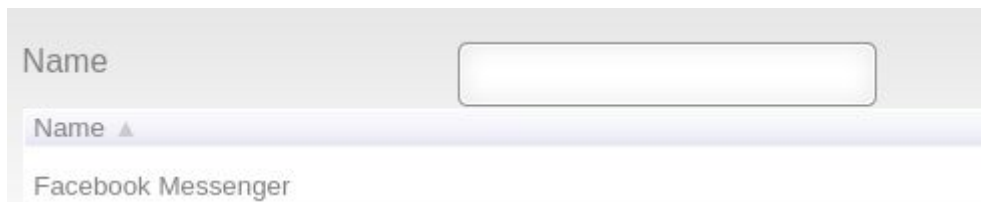
Note: To delete a supervisor, click the delete button, , located to the right of the supervisor's name.

58. Click the "Finish Button Action Type" (The small close button in the upper right corner of the chat screen) input box. A dropdown list will appear with two selections described below choose the desired selection or none at all:




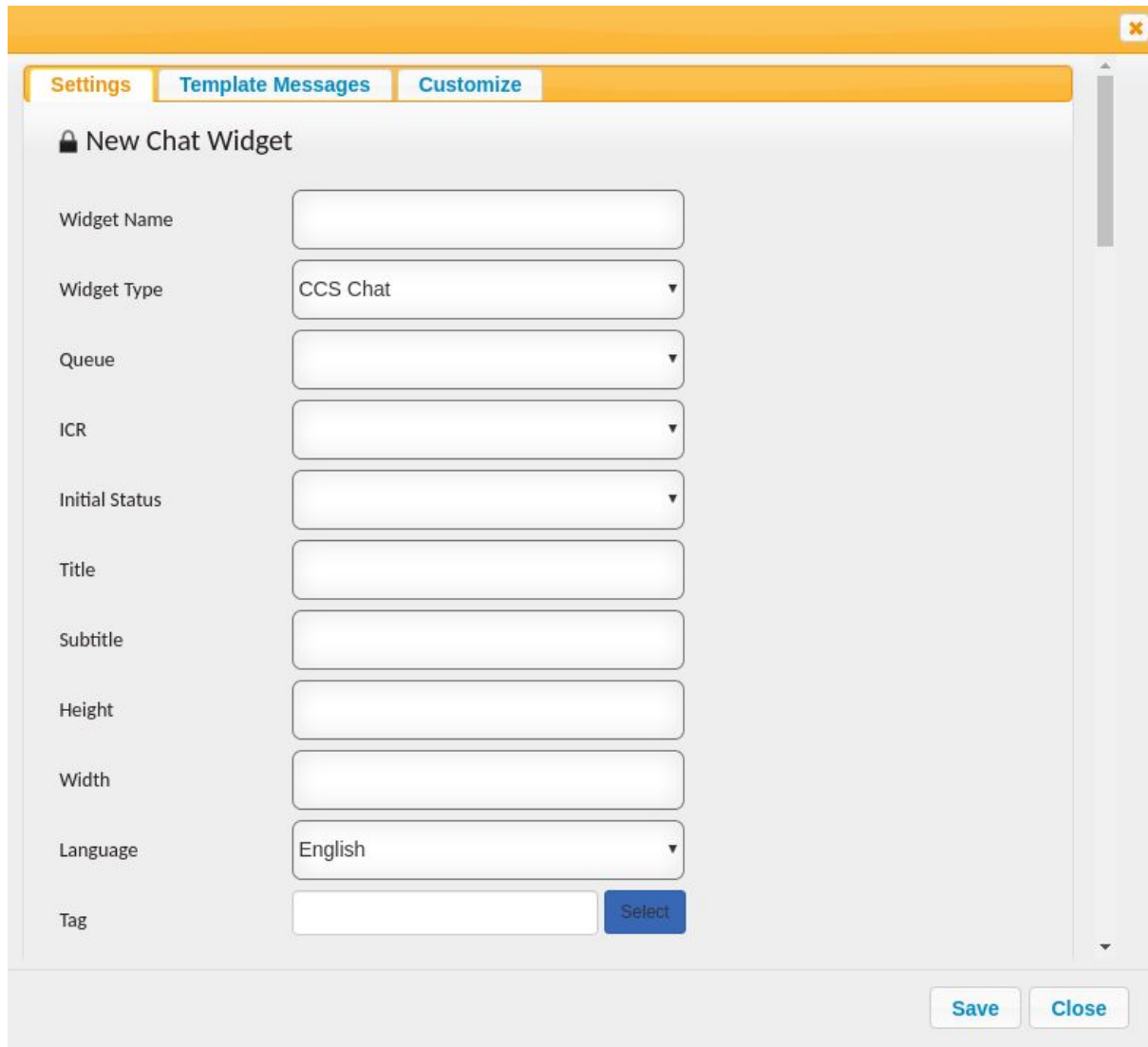
Chat End	Ends the chat.
Chat Park	Parks the chat. If the client's customer responds to the chat within 24 hours, the same agent can return to the chat and also review the prior conversation.

59. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, , the created Facebook Messenger chat can be viewed in the chat widget name list as shown below:

A screenshot of a web interface showing a list of chat widget names. At the top, there is a header row with the label "Name" and an empty text input field. Below this is a table with a single row containing the text "Facebook Messenger". The table has a light blue header row with the label "Name" and a small upward-pointing triangle icon.

Creating an Infobip Widget (Settings Tab)

1. Click the New button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



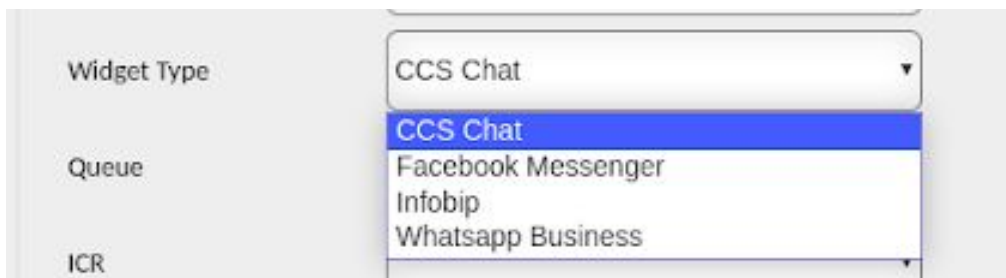
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



Widget Type

Queue

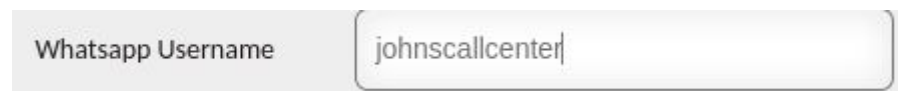
ICR

4. Select the “Infobip” widget type from the dropdown list an example selection is shown below:



Widget Type

5. Click the “WhatsApp Username” input box, type the WhatsApp (Infobip) username an example is shown below:




Whatsapp Username

6. Click the “WhatsApp Password” input box, type the WhatsApp (infobip) password an example is shown below:

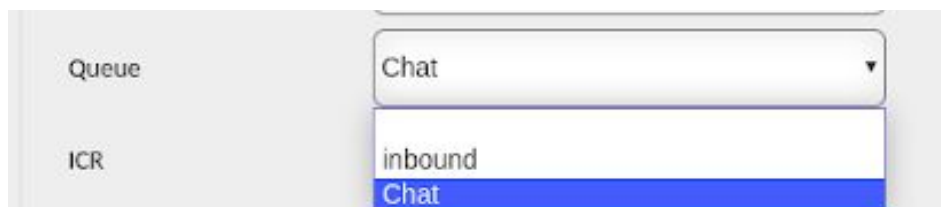


Whatsapp Password

7. After completing steps 5 and 6, a basic authorization token can be generated in the “Whatsapp Basic Authorization” input box by clicking the show button, .
8. After completing step 7, a WhatsApp authorization token can be generated in the “Whatsapp App Authorization” box. WhatsApp basic Authorization is password dependent, whereas WhatsApp App Authorization is not. For this reason, WhatsApp App authorization is preferred over basic authorization. This authorization code will then be used in the Infobip API.
9. Click the “WhatsApp Phone Number” input box, type the WhatsApp phone number.
The input box is shown below:

A screenshot of a web form showing a label 'Whatsapp Phone Number' followed by an empty text input box.

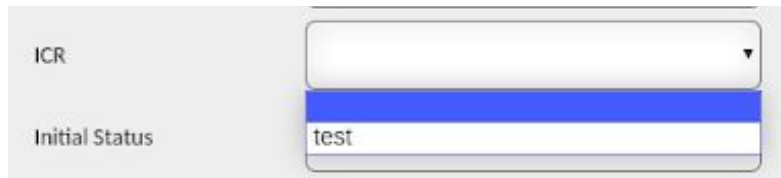
10. Click the “WhatsApp Scenario Key” input box, type the WhatsApp Scenario Key provided by the Infobip Company.
11. Click the “WhatsApp Base URL” input box, type the desired company Infobip URL given when the Infobip account was created for example SmithCo.api.infobip.com.
12. Click the “WhatsApp Account Key” input box, type the WhatsApp account key from the Infobip account.
13. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:

A screenshot of a web form showing a label 'Queue' followed by a dropdown menu. The dropdown menu is open, showing three options: 'Chat', 'inbound', and 'Chat' (highlighted in blue). Below the 'Queue' label, there is also a label 'ICR'.

14. Select the desired queue from the dropdown list an example selection is shown below:

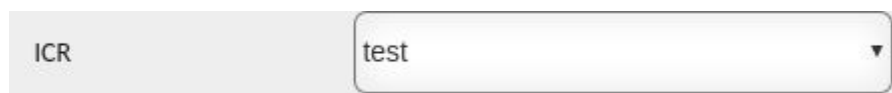
A screenshot of a user interface showing a label 'Queue' next to a dropdown menu. The dropdown menu is open, displaying the word 'Chat' as the selected option.

15. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:

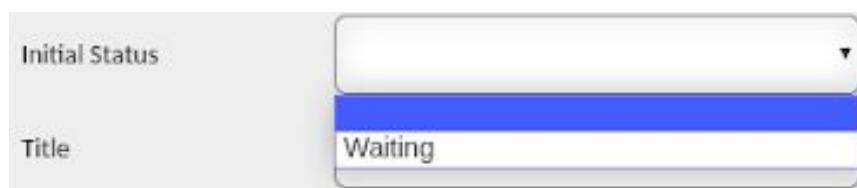
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'test' selected and highlighted in blue.

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

16. Select an ICR from the dropdown list, if desired. An example selection is shown below:

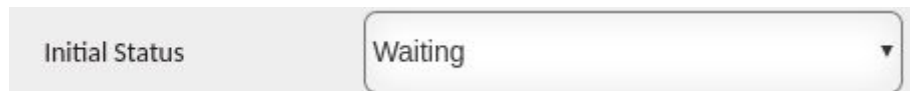
A screenshot of a user interface showing a label 'ICR' next to a dropdown menu. The dropdown menu is open, displaying the word 'test' as the selected option.

17. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:

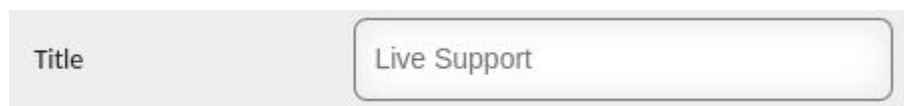
A screenshot of a user interface showing a label 'Initial Status' next to a dropdown menu. The dropdown menu is open, displaying a list of options with 'Waiting' selected and highlighted in blue.

Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

18. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Initial Status" in a dark gray font. To the right of this box is a white rectangular dropdown menu with a thin gray border. Inside the dropdown, the word "Waiting" is displayed in a dark gray font. A small dark gray triangle points downwards from the right side of the dropdown box.

19. Click the “Title” input box, type a name for the chat (customer will be able to see) an example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Title" in a dark gray font. To the right of this box is a white rectangular input box with a thin gray border. Inside the input box, the text "Live Support" is displayed in a dark gray font.

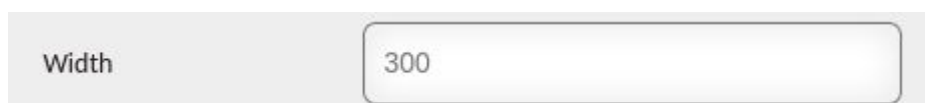
20. Click the “Subtitle” input box, type a name for the subtitle of the chat (customer will be able to see) an example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Subtitle" in a dark gray font. To the right of this box is a white rectangular input box with a thin gray border. Inside the input box, the text "Live Support" is displayed in a dark gray font.

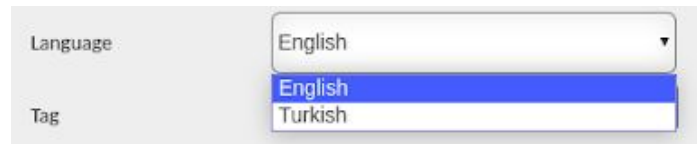
21. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Height" in a dark gray font. To the right of this box is a white rectangular input box with a thin gray border. Inside the input box, the number "300" is displayed in a dark gray font.

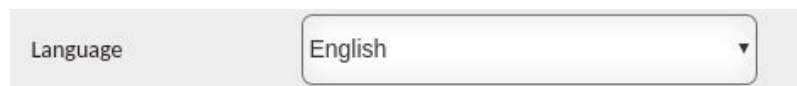
22. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

A screenshot of a form element. On the left is a light gray rectangular box with the text "Width" in a dark gray font. To the right of this box is a white rectangular input box with a thin gray border. Inside the input box, the number "300" is displayed in a dark gray font.

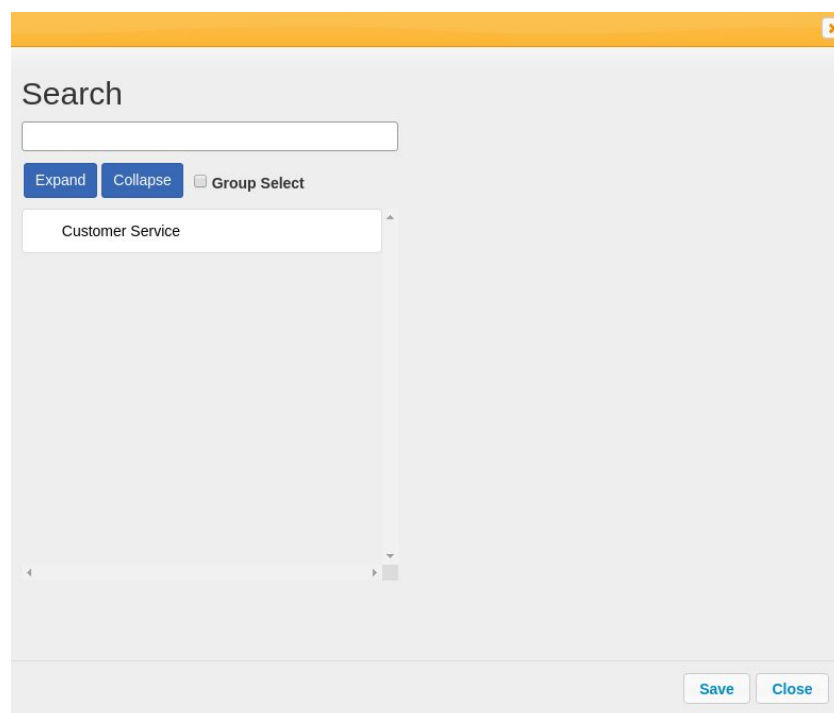
23. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):



24. Select the desired language from the dropdown list. An example is shown below:



25. Click the Select button, to the right of the “Tag” input box. The following pop-up window will appear:

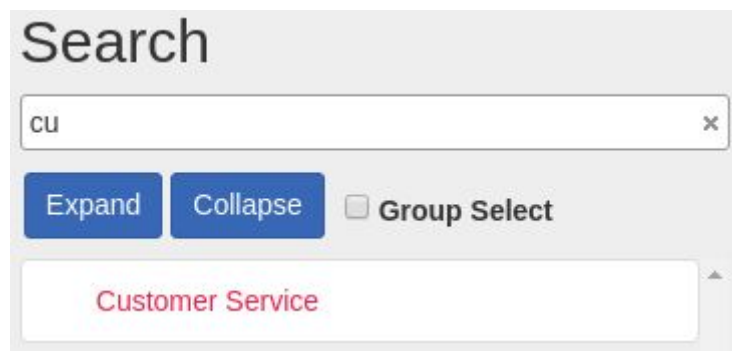


*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*


26. Search for a Tag using the “Search” input box shown below:


A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A vertical cursor is visible at the beginning of the input box.

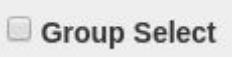
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of the search interface showing results. The "Search" title is at the top. Below it is an input box containing the text "cu" with a clear button (an 'x' in a circle) on the right. Underneath the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a list of search results. The first result, "Customer Service", is displayed in a red font. A small upward-pointing arrow is visible to the right of the result text.

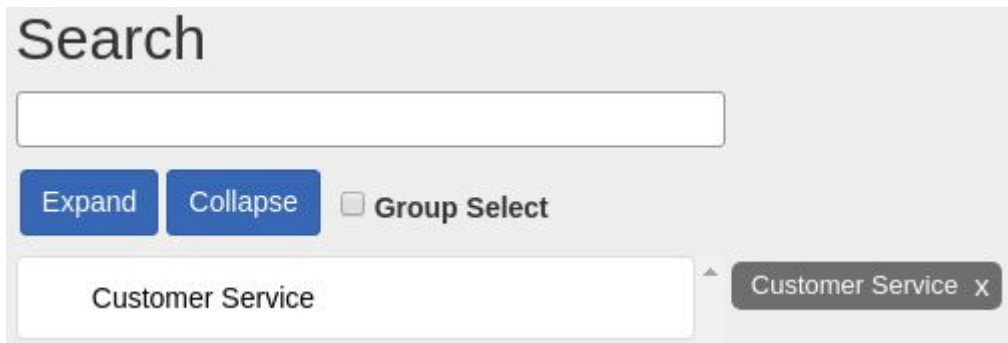
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)


Check the Group Select Checkbox, , to group select tags.

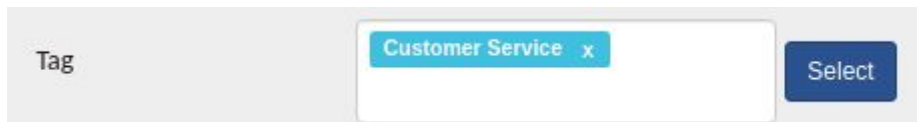
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a 'Search' interface. At the top is a search input field. Below it are two buttons: 'Expand' and 'Collapse', followed by a checkbox labeled 'Group Select'. Below these is a list box containing the text 'Customer Service'. To the right of the list box is a small upward-pointing arrow and a tag box containing the text 'Customer Service' followed by an 'x' icon for deletion.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

27. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



The screenshot shows a 'Tag' input box. Inside the box is a tag with the text 'Customer Service' and an 'x' icon. To the right of the input box is a blue 'Select' button.

28. Click the “Support Email” type the desired support email. An example is shown below:



The screenshot shows a 'Support E-Mail' input box. Inside the box is the email address 'johnsmith@johnscallcenter.com'.

29. Following the Support Email input box, there are three checkbox selections outlined below. Select the desired checkboxes:

<div>Email Optional <input type="checkbox"/></div>	<p>Makes the email input field optional for the customer to input.</p>
<div>Phone Optional <input type="checkbox"/></div>	<p>Makes the phone input field optional for the customer to input.</p>
<div>Show Ended Chats on the Agent Screen. <input type="checkbox"/></div>	<p>Shows that the chat ended on the agent's screen.</p>

Below is an example chat window. If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:

Live Support

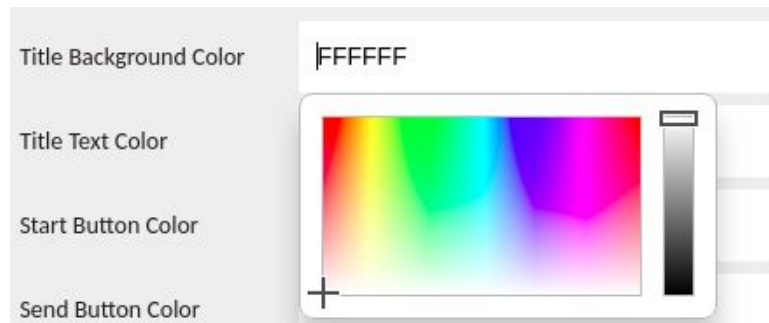
Name Surname

Email

Phone Number

Start Chatting

30. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

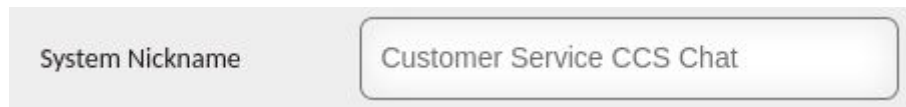
31. Select the desired custom color an example selection is shown below:



32. Click the “Title Text Color” input box, repeat steps 20 -21.
33. Click the “Start button Color” input box, repeat steps 20-21.
34. Click the “Send button Color” input box, repeat steps 20-21.
35. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

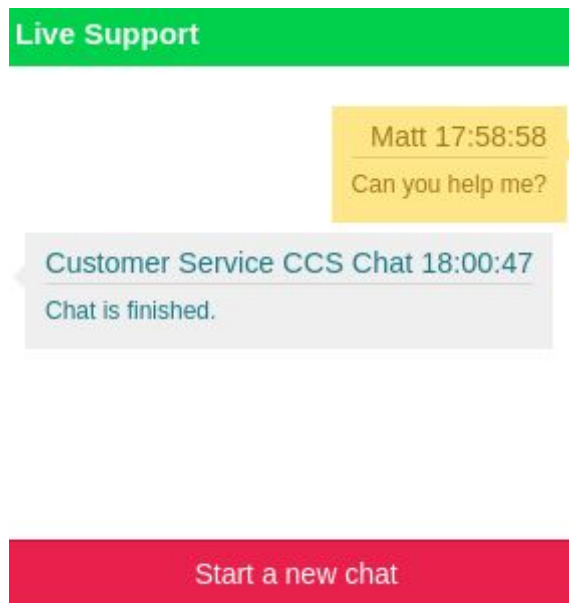


36. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:



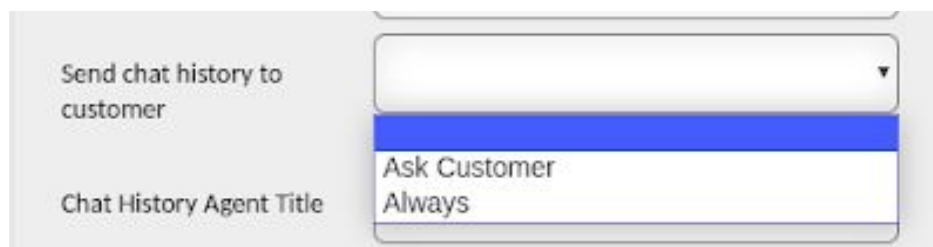
A screenshot of a configuration interface. On the left, the text "System Nickname" is displayed. To its right is a rounded rectangular input box containing the text "Customer Service CCS Chat".

The system nickname is shown at the top of each message sent an example is shown below:



A screenshot of a chat widget interface. At the top is a green bar with the text "Live Support". Below it, a yellow message bubble from "Matt 17:58:58" says "Can you help me?". Below that, a grey message bubble from "Customer Service CCS Chat 18:00:47" says "Chat is finished.". At the bottom is a red button with the text "Start a new chat".

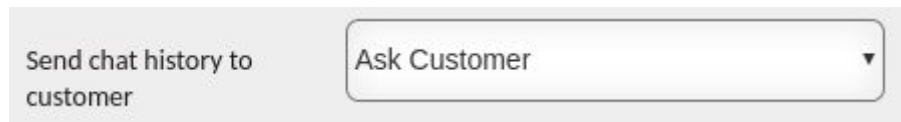
37. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:



A screenshot of a configuration interface. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu. The dropdown is open, showing two options: "Ask Customer" and "Always". Below the dropdown, the text "Chat History Agent Title" is visible.

Note: the selection can also be left blank.


38. Select the desired option, an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a rounded rectangular border. The menu is open, showing the selected option "Ask Customer" and a small downward-pointing triangle icon on the right side of the menu box.

39. Click “Chat History Agent Title”, type a title. An example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a rounded rectangular border. The field contains the text "Agent".

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. It shows a light gray rectangular box with a small speech bubble icon on the left side. Inside the box, the text "John Smith - Queue - 2020-07-07 19:35:44" is displayed in a teal color. Below this text, the question "How can I help you?" is displayed in a teal color.

40. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

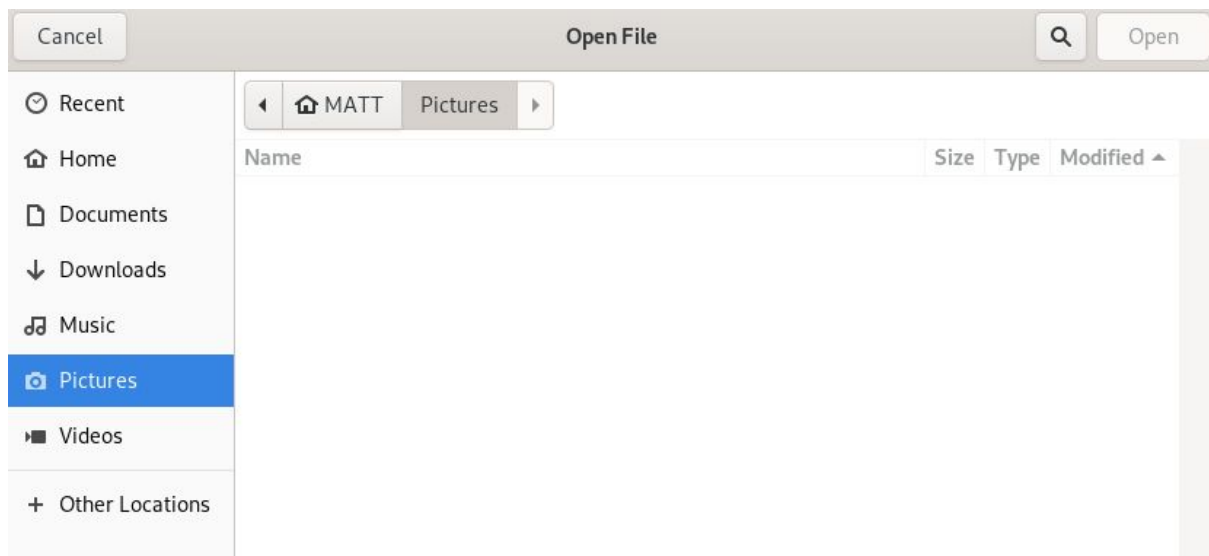


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

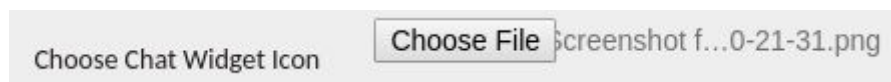
41. Select the desired widget version an example selection is shown below:



42. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



43. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:






44. Check “Auto Finish” checkbox, if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



45. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame is shown below:



46. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

47. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

First Welcoming Message	<div>Hello, Thank you for using our chat system.</div>
-------------------------	--

48. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

49. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

50. In the “Agent left Message” input box, type an agent left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
--------------------	--

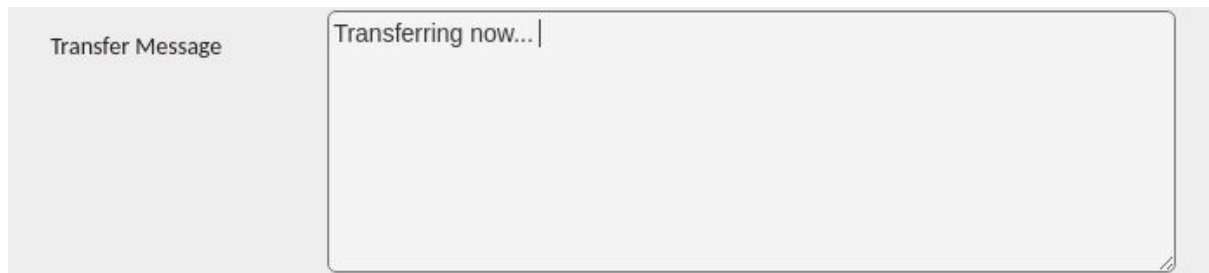
51. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	<div>A customer service agent will be with you shortly.</div>
---------------	---

52. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	<div>Goodbye!</div>
---------------------	---------------------

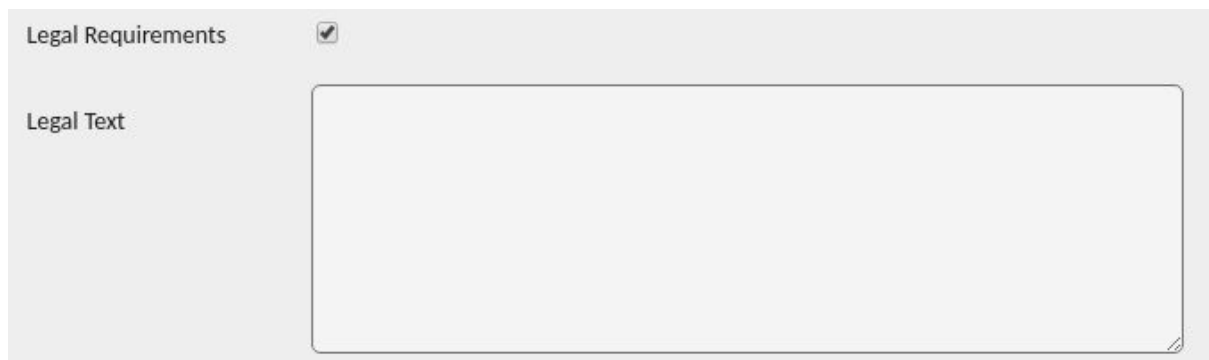
53. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

A screenshot of a user interface element. On the left, the text "Transfer Message" is displayed. To its right is a large, empty rectangular text input box with a thin border and a small cursor icon at the bottom right corner.

54. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish, if desired. An example is shown below:

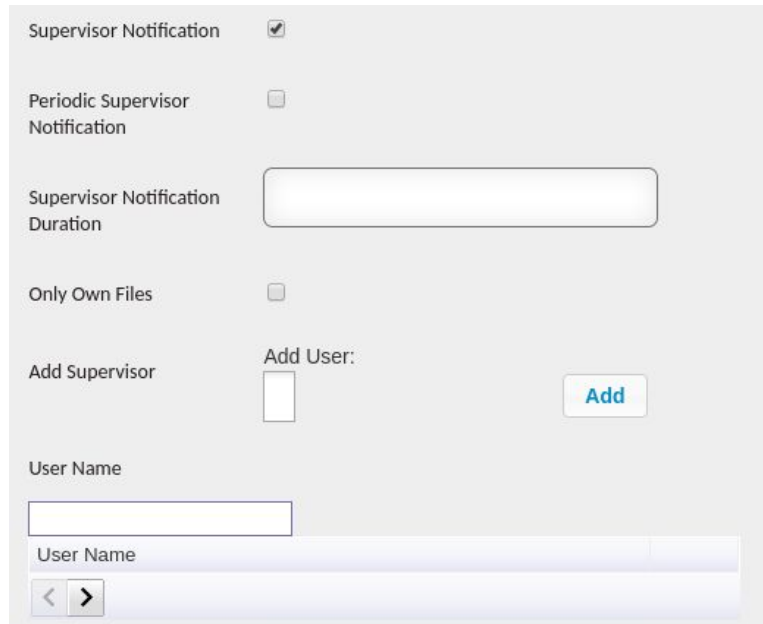
A screenshot of a user interface element. On the left, the text "Auto Finish Message Duration" is displayed. To its right is a rectangular text input box containing the number "180".

55. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:

A screenshot of a user interface element. On the left, the text "Legal Requirements" is displayed next to a checked checkbox. Below this, the text "Legal Text" is displayed. To the right of "Legal Text" is a large, empty rectangular text input box with a thin border and a small cursor icon at the bottom right corner.

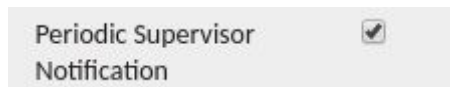
56. If desired in the “Legal Text” input box type the desired legal text.

57. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



The screenshot shows a settings panel for Supervisor Notifications. It includes a checked checkbox for "Supervisor Notification", an unchecked checkbox for "Periodic Supervisor Notification", a text input field for "Supervisor Notification Duration", an unchecked checkbox for "Only Own Files", and a section for "Add Supervisor" with an "Add User:" label, a small input field, and an "Add" button. At the bottom, there is a "User Name" label and a list of users with a scroll bar.

58. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



The screenshot shows a close-up of the "Periodic Supervisor Notification" checkbox, which is checked.

59. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:

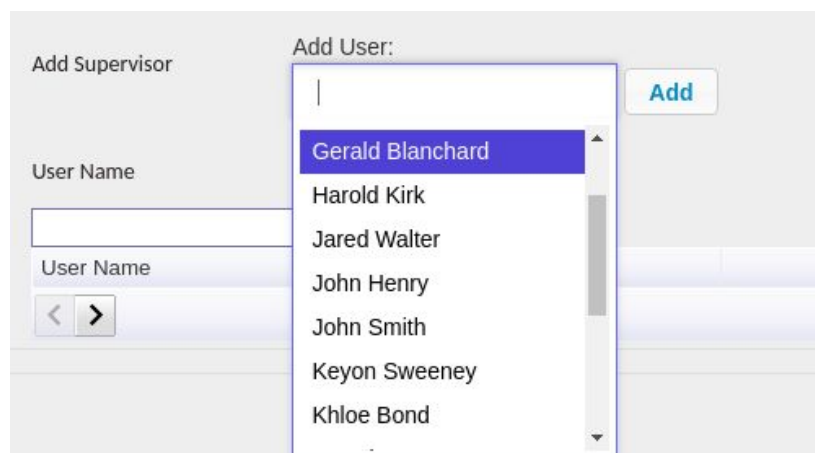



The screenshot shows a close-up of the "Supervisor Notification Duration" input box, which contains the text "180".

60. Check the “Only Own Files” checkbox, an example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):




61. Click the “Add Supervisor” input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:



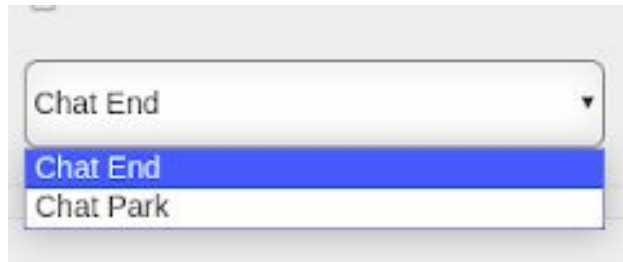
62. Select the desired Supervisor and click the add button, .

63. The supervisor’s name will appear in the “User Name” field an image of this field is shown below:



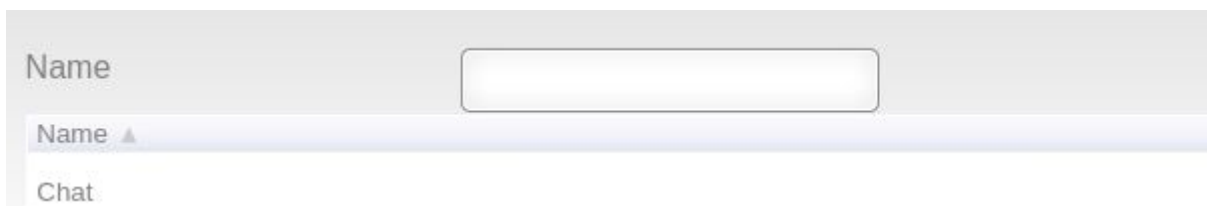
Note: To delete a supervisor, click the delete button, , located to the right of the supervisor’s name.

64. Click the “Finish Button Action Type” input box a dropdown list will appear with two selections described below choose the desired selection or none at all:




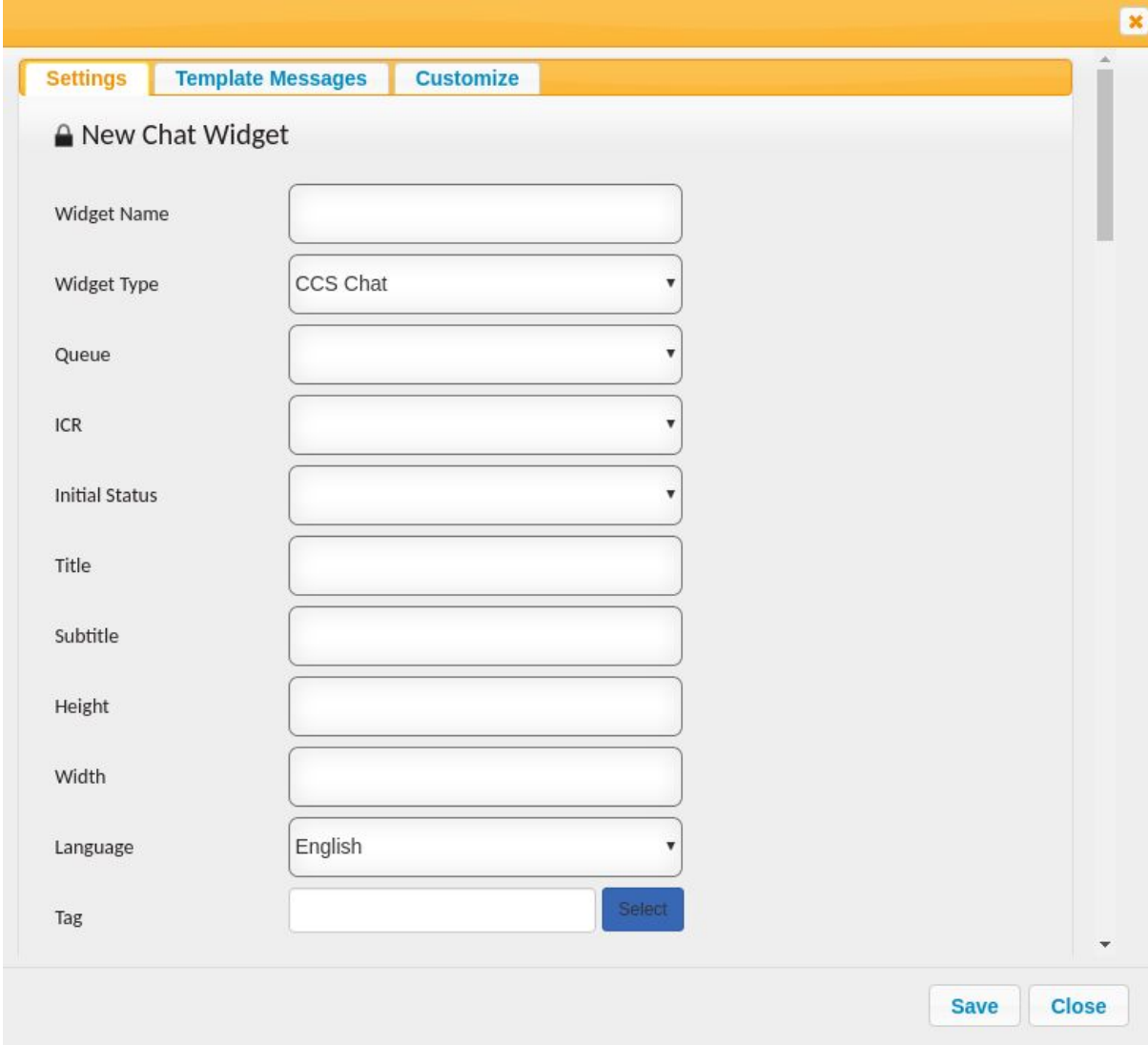
Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client’s customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

65. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, [Save](#), the created CCS chat can be viewed in the chat widget name list as shown below:



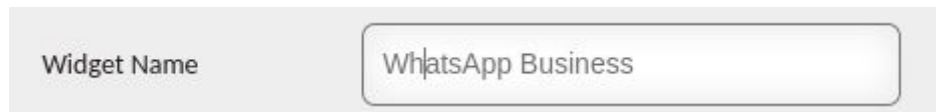
Creating a WhatsApp Business Widget (Settings Tab)

1. Click the “New” button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



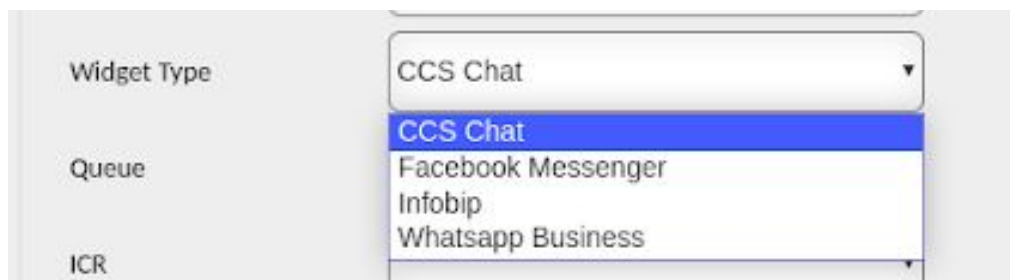
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



Widget Name

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:

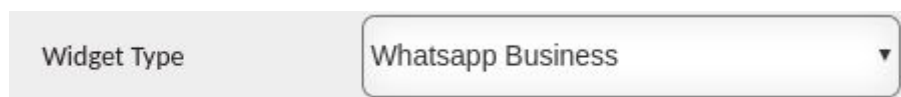


Widget Type

Queue

ICR

4. Select the “Whatsapp Business” from the dropdown list an example selection is shown below:



Widget Type

5. Click the “WA Business Username” input box, type the WA Business Username an example is shown below:



WA Business Username

6. Click the “WA Business Password” input box, type the WA Business Password an example is shown below:

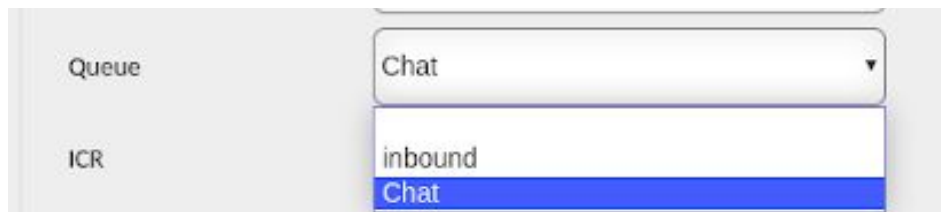


WA Business Password

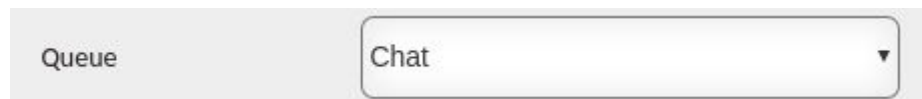
7. Click the “Admin Auth Token” input box, type the Admin Auth Token (Provided by the Call Center Studio Team) After seven days, the token changes automatically. It is essential for using the WhatsApp Business API.
8. Click the “WA Business Endpoint” input box, type the server address provided by the Call Center Studio Team.
9. Click the “WhatsApp Phone Number” input box, type the WhatsApp Phone Number the input box is shown below:

A screenshot of a form field labeled "Whatsapp Phone Number" in a light gray box. To the right of the label is a white rectangular input box with a thin gray border.


10. Click the “Queue” input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:

A screenshot showing a dropdown menu for the "Queue" field. The dropdown is open, displaying three options: "Chat", "inbound", and "Chat". The "Chat" option at the bottom is highlighted with a blue background. To the left of the dropdown, the labels "Queue" and "ICR" are visible in a light gray box.

11. Select the desired queue from the dropdown list an example selection is shown below:

A screenshot of the "Queue" dropdown menu after a selection. The dropdown is closed, and the word "Chat" is displayed inside the white input box. The label "Queue" is visible in the light gray box to the left.

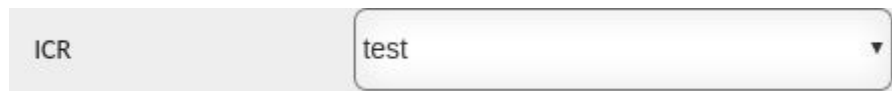
12. Select the “ICR” input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



A screenshot of a form with two labels: "ICR" and "Initial Status". The "ICR" label is positioned above a dropdown menu that is open, showing a list of options. The "Initial Status" label is positioned below the "ICR" label and above a text input field containing the word "test".

Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, web chat, Facebook, whatsapp, etc. It enables customers to self select their queues, make requests, etc.

13. Select an ICR from the dropdown list if desired an example selection is shown below:



A screenshot of a form with a label "ICR" positioned above a dropdown menu. The dropdown menu is open, showing a list of options, with the word "test" selected and highlighted.

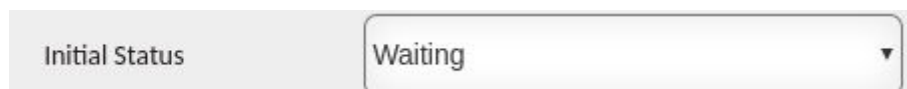
14. Click the “Initial Status” input box a dropdown menu will appear an example is shown below:



A screenshot of a form with two labels: "Initial Status" and "Title". The "Initial Status" label is positioned above a dropdown menu that is open, showing a list of options. The "Title" label is positioned below the "Initial Status" label and above a text input field containing the word "Waiting".

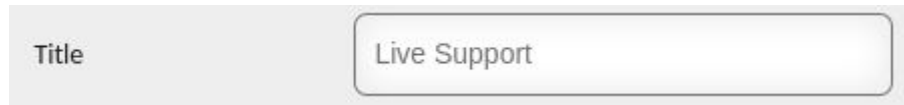
Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as “waiting,” “blank,” or “ICR Status.”

15. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

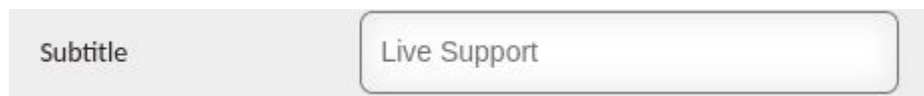


A screenshot of a form with a label "Initial Status" positioned above a dropdown menu. The dropdown menu is open, showing a list of options, with the word "Waiting" selected and highlighted.

16. Click the “Title” input box, type a name for the Chat (Customer will be able to see) an example is shown below:

A screenshot of a form with a label 'Title' on the left and a text input box on the right. The input box contains the text 'Live Support'.

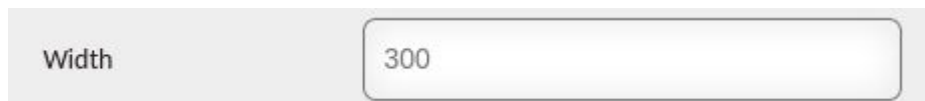
17. Click the “Subtitle” input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:

A screenshot of a form with a label 'Subtitle' on the left and a text input box on the right. The input box contains the text 'Live Support'.

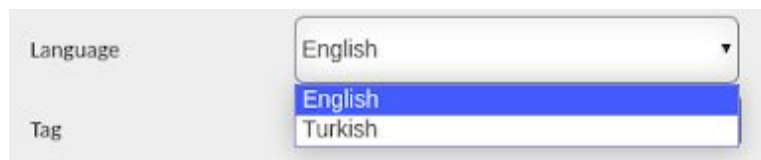
18. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

A screenshot of a form with a label 'Height' on the left and a text input box on the right. The input box contains the number '300'.

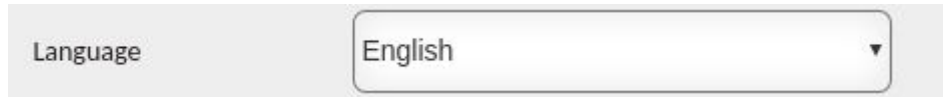
19. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:


A screenshot of a form with a label 'Width' on the left and a text input box on the right. The input box contains the number '300'.

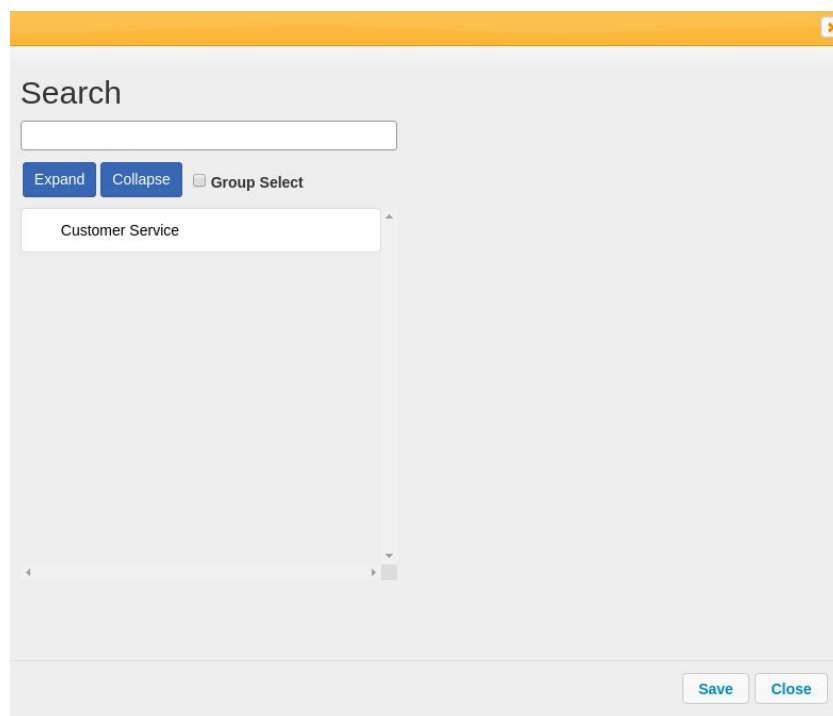
20. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

A screenshot of a form with a label 'Language' on the left and a dropdown menu on the right. The dropdown menu is open, showing a list of languages: 'English' (selected), 'English', and 'Turkish'. There is also a 'Tag' label below the 'Language' label.

21. Select the desired language from the dropdown list. An example is shown below:

A light gray rectangular box containing the word "Language" on the left and a dropdown menu on the right. The dropdown menu is open, showing "English" with a small downward arrow on its right side.

22. Click the Select button,  to the right of the “Tag” input box. The following pop-up window will appear:

A pop-up window with a yellow title bar and a close button (X) in the top right corner. The window has a light gray background. At the top, the word "Search" is displayed. Below it is a white search input field. Under the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a white rectangular box containing the text "Customer Service". At the bottom right of the window are two small buttons labeled "Save" and "Close".

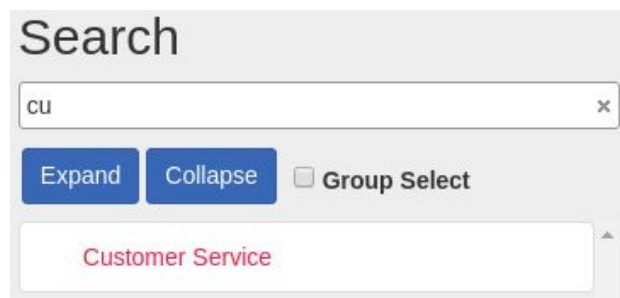
*Note: Only Tags that were made available for the chat can be viewed here (See **Tag** Section)*

23. Search for a Tag using the “Search” input box shown below:




A search input box with the label "Search" above it. The input field is empty and has a light gray border.


Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



A search interface showing a search box with the text "cu" entered. Below the search box are two buttons: "Expand" and "Collapse". To the right of these buttons is a checkbox labeled "Group Select". Below the buttons is a list box containing the text "Customer Service" in red font.

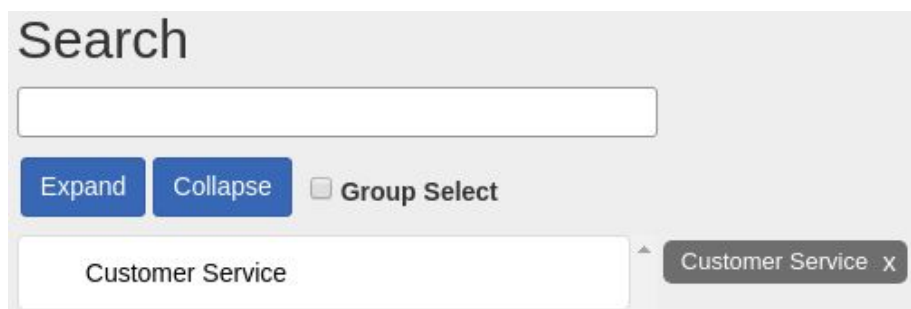
Note:

Press the Expand button, , to expand the selection (Used for child tags)


Press the Collapse button, , to collapse the selection (Used for child tags)


Check the Group Select Checkbox, , to group select tags

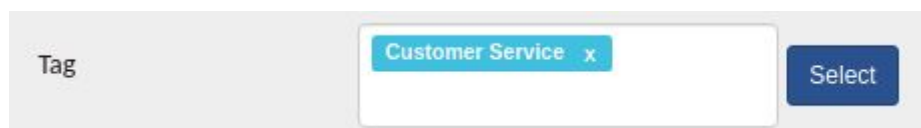
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



A search interface showing a search box with the text "Customer Service" entered. Below the search box are two buttons: "Expand" and "Collapse". To the right of these buttons is a checkbox labeled "Group Select". Below the buttons is a list box containing the text "Customer Service" in red font. To the right of the list box is a button labeled "Customer Service" with a close icon (x).

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

24. Once the desired Tag selections have been selected and can be viewed to the right of the tag list box click the save button, , the “Tag” input box with an example selection is shown below:



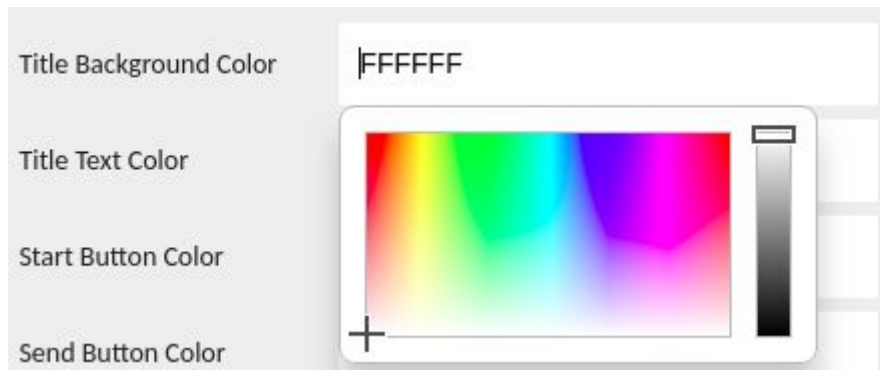
25. Click the “Support Email” type the desired support email. An example is shown below:



26. Following the “Support Email” input box, there are three checkbox selections outlined below select the desired checkboxes:

<div>Email Optional <input type="checkbox"/></div>	<p>Makes the email optional for the customer to input.</p>
<div>Phone Optional <input type="checkbox"/></div>	<p>Makes the phone optional for the customer to input.</p>
<div>Show Ended Chats on the Agent Screen. <input type="checkbox"/></div>	<p>Shows that the chat ended on the agent’s screen.</p>

27. Click the “Title Background Color” input box. A color palette will appear, as shown below:



Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

28. Select the desired custom color an example selection is shown below:



29. Click the “Title Text Color” input box, repeat steps 20 -21.

30. Click the “Start button Color” input box, repeat steps 20-21.

31. Click the “Send button Color” input box, repeat steps 20-21.

32. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

Title Background Color	466DFF
Title Text Color	67FF98
Start Button Color	FF4365
Send Button Color	FFF365
Logout Button Color	000000

33. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:

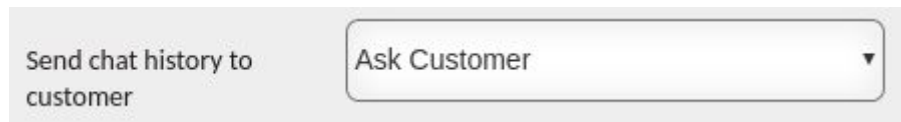
System Nickname	Customer Service CCS Chat
-----------------	---------------------------

34. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:

Send chat history to customer	<div>▼</div>
Chat History Agent Title	Ask Customer Always

Note: the selection can also be left blank.


35. Select the desired option, an example selection is shown below:

A screenshot of a user interface element. On the left, the text "Send chat history to customer" is displayed. To its right is a dropdown menu with a white background and a thin grey border. The menu is open, showing the selected option "Ask Customer" in a dark grey font. A small downward-pointing triangle is visible on the right side of the menu box.

36. Click “Chat History Agent Title”, type a title an example is shown below:

A screenshot of a user interface element. On the left, the text "Chat History Agent Title" is displayed. To its right is a text input field with a white background and a thin grey border. The field contains the text "Agent" in a dark grey font.

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:

A screenshot of a chat record entry. The entry is displayed in a light grey box with a small white triangle on the left side. The text "John Smith - Queue - 2020-07-07 19:35:44" is shown in a teal font, underlined. Below this, the text "How can I help you?" is shown in a teal font.

37. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:

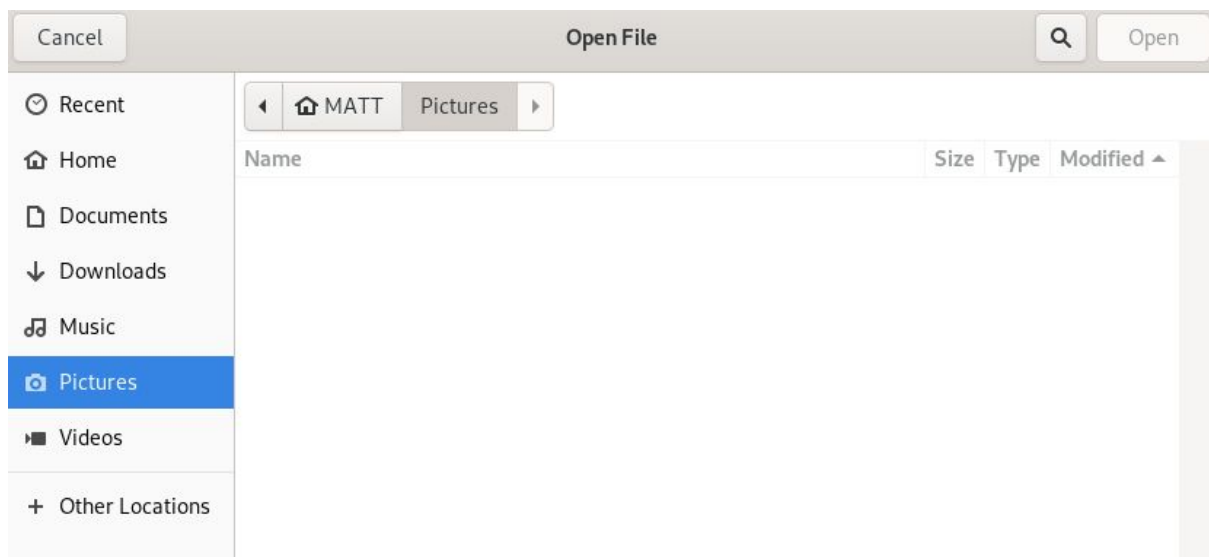


Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat).
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat).
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat).

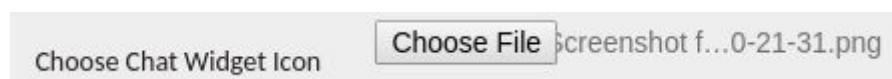
38. Select the desired widget version an example selection is shown below:



39. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, **Choose File**, to create a custom chat icon from saved photos on the device. A pop-up window will appear showing your saved files as shown below:



40. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:






41. Next to the “Auto Finish” checkbox, check auto finish if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



42. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:



43. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	<p>When parking is pressed by the agent, the customer will be transferred to the queue.</p>
	<p>When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds the same agent will receive the chat.</p>
	<p>When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.</p>

44. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

45. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:

Welcoming Message	<div>How can I help you today? </div>
-------------------	---------------------------------------

46. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:

Closing Message	<div>Have a nice day!</div>
-----------------	-----------------------------

47. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

Agent Left Message	<div>The agent has left the chat. A new agent will join shortly.</div>
--------------------	--

48. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

Queue Message	A customer service agent will be with you shortly.
---------------	--

49. In the “Auto Finish Message” input box, type an auto finish message for the chat if desired an example is shown below:

Auto Finish Message	Goodbye!
---------------------	----------

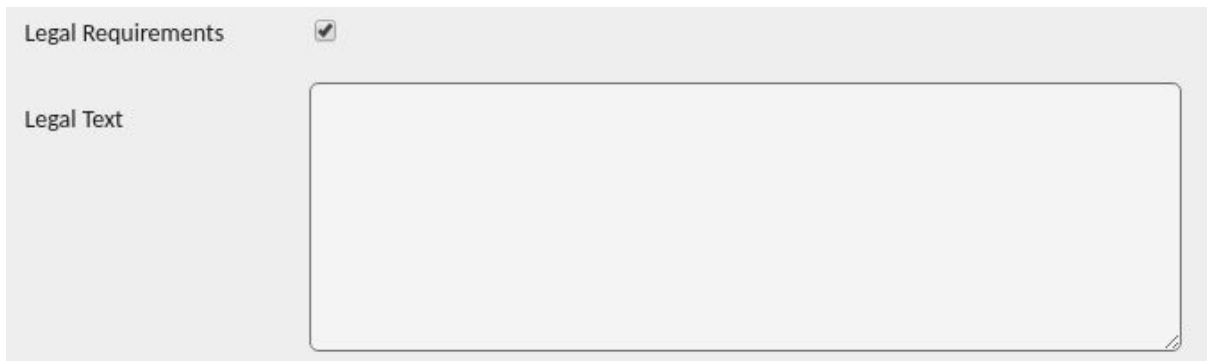
50. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:

Transfer Message	Transferring now...
------------------	---------------------

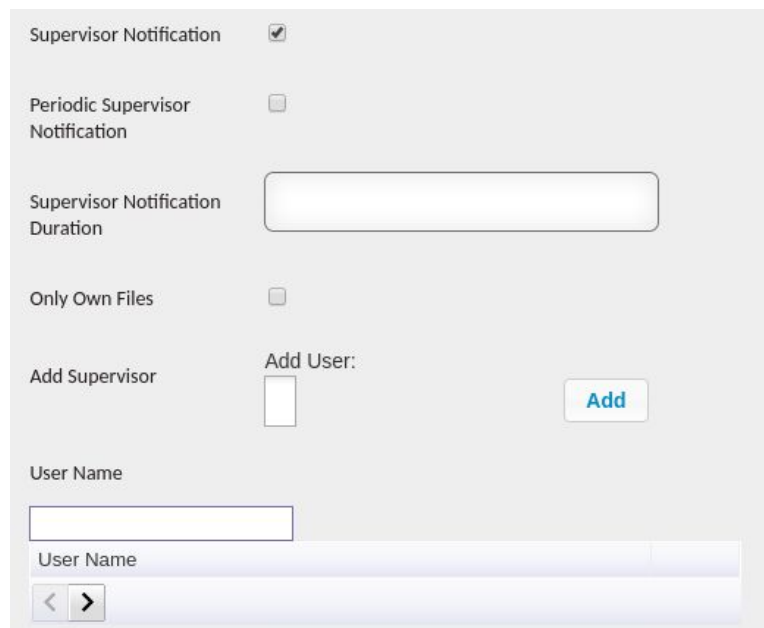
51. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:

Auto Finish Message Duration	180
---------------------------------	-----

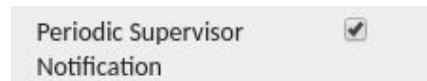
52. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:



53. If desired in the “Legal Text” input box type the desired legal text.
54. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



55. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):



Periodic Supervisor Notification ☒

56. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:



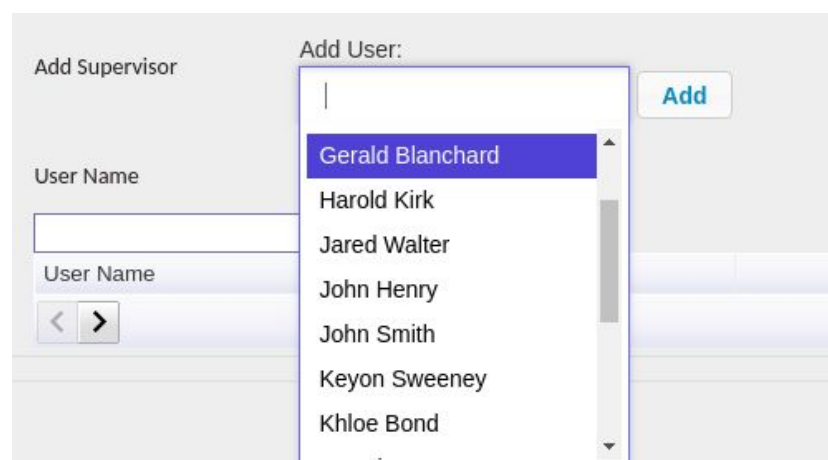
Supervisor Notification Duration

57. Check the “Only Own Files” checkbox, an example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):



Only Own Files ☒

58. Click the “Add Supervisor” input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:



Add Supervisor

User Name


User Name

< >

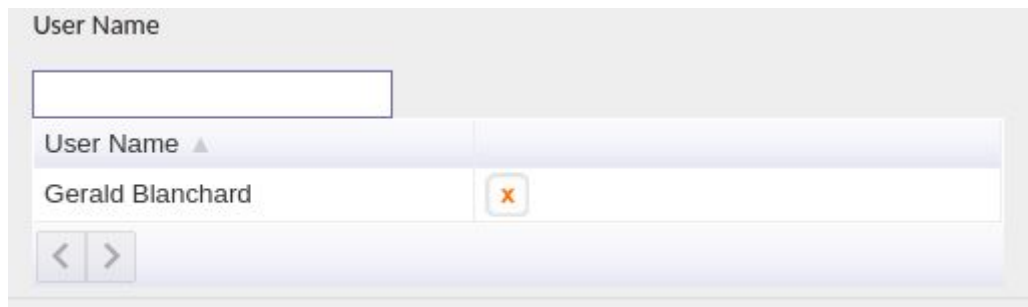
Add User:


- Gerald Blanchard
- Harold Kirk
- Jared Walter
- John Henry
- John Smith
- Keyon Sweeney
- Khloe Bond

Add

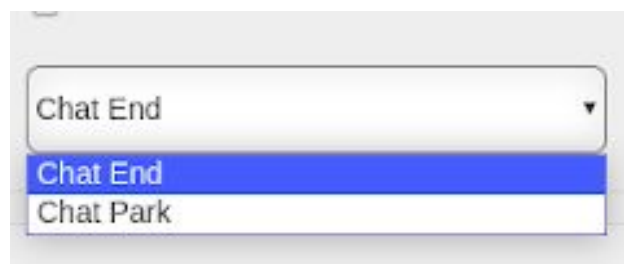
59. Select the desired Supervisor and click the add button, .

60. The supervisor's name will appear in the "User Name" field an image of this field is shown below:




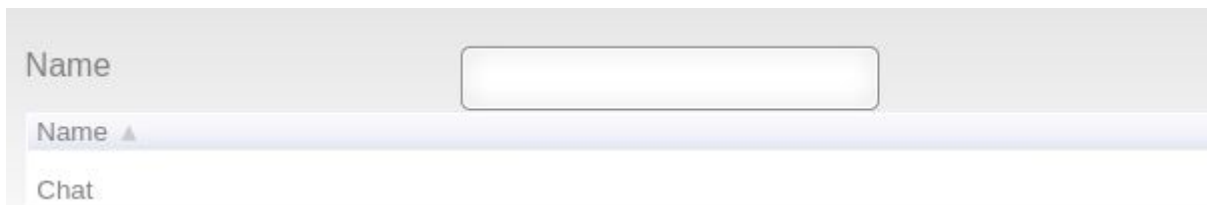
Note: To delete a supervisor, click the delete button, , located to the right of the supervisor's name.

61. Click the "Finish Button Action Type" input box a dropdown list will appear with two selections described below choose the desired selection or none at all:



Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client's customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

62. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, , the created WhatsApp business chat can be viewed in the chat widget name list as shown below:

A screenshot of a web interface showing a list of chat widgets. At the top, there is a header row with a "Name" label and an empty text input field. Below this is a table with a light blue header row containing "Name" and a small upward-pointing triangle. The first row of the table has a single cell with the text "Chat".

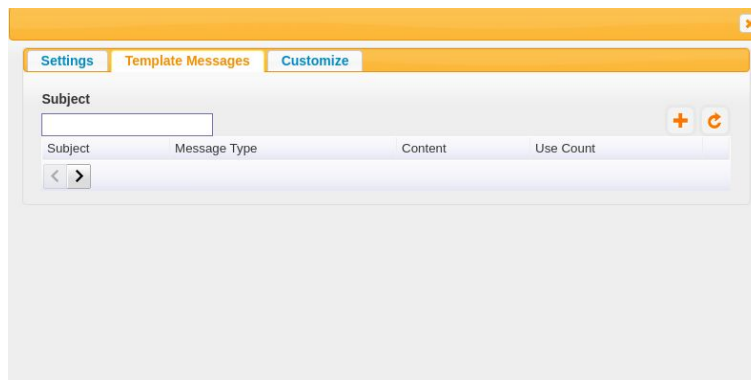
Name
Chat


Creating a Template Message (Template messages Tab)

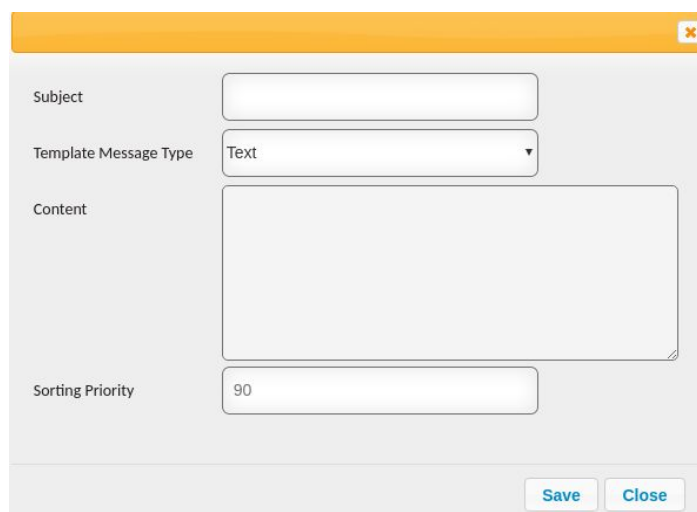
Template messages are prewritten messages that the agent can use to expedite customer service requests. Normally messages are created based on frequently asked questions associated with the business.

1. From the main widget pop-up screen click the Template Messages Tab,

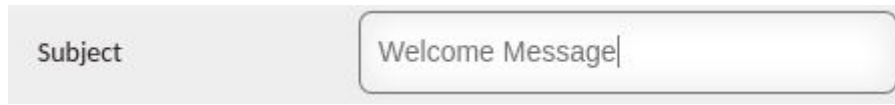
Template Messages, located to the right of the settings tab, **Settings**, the following screen will appear:



2. Click the “New” button, , located in the top right-hand corner of the pop-up window, the following screen will be displayed:

A screenshot of the 'New' template message form. The form has a yellow header bar with a close button (X). The form contains the following fields: 'Subject' (text input), 'Template Message Type' (dropdown menu with 'Text' selected), 'Content' (large text area), and 'Sorting Priority' (text input with '90' entered). At the bottom right, there are two buttons: 'Save' and 'Close'.

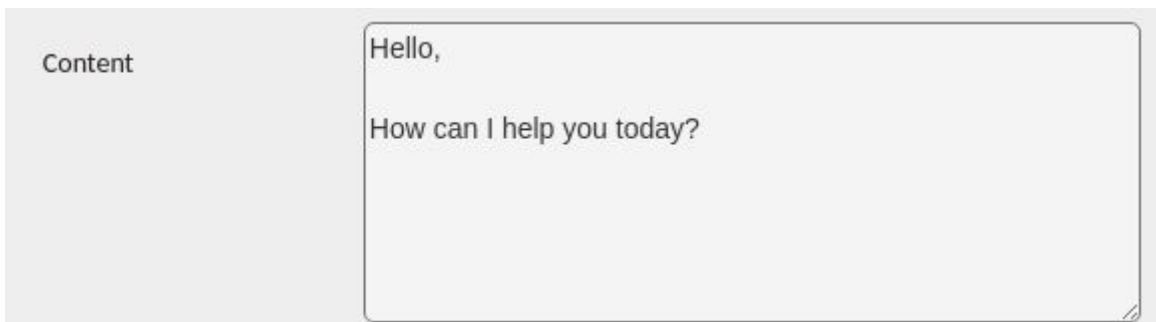
3. Click the “Subject” input box, type the subject of the template. An example is shown below:

A screenshot of a web interface showing a label 'Subject' on the left and a text input box on the right. The input box contains the text 'Welcome Message'.

4. Click the “Template Message Type” input box. A dropdown selection will appear with three selection types explained below to select the desired type from the list:

Text	Template message that sends the prewritten text.
Image	Template message that sends the uploaded image.
Document	Template message that sends the uploaded document.

5. Click the “Content” input box and type the content you want to display; an example is shown below:

A screenshot of a web interface showing a label 'Content' on the left and a large text input box on the right. The input box contains the text 'Hello, How can I help you today?'.

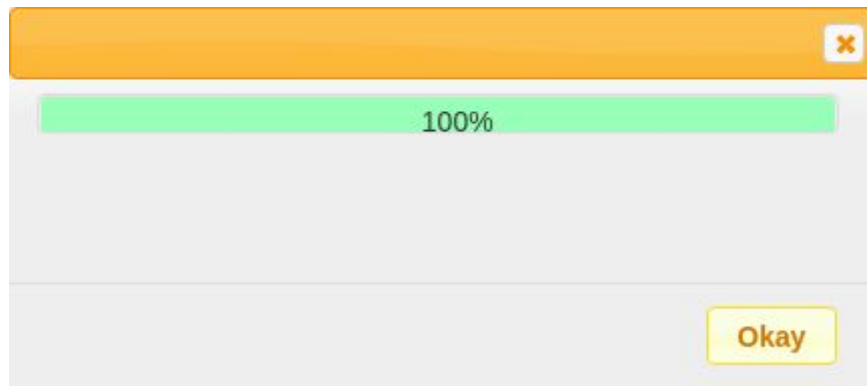
6. In the “Sorting Priority” input box, type the desired sorting priority (the higher the number, the template message will be listed closer to the top for easy agent selection).

A default example is shown below:

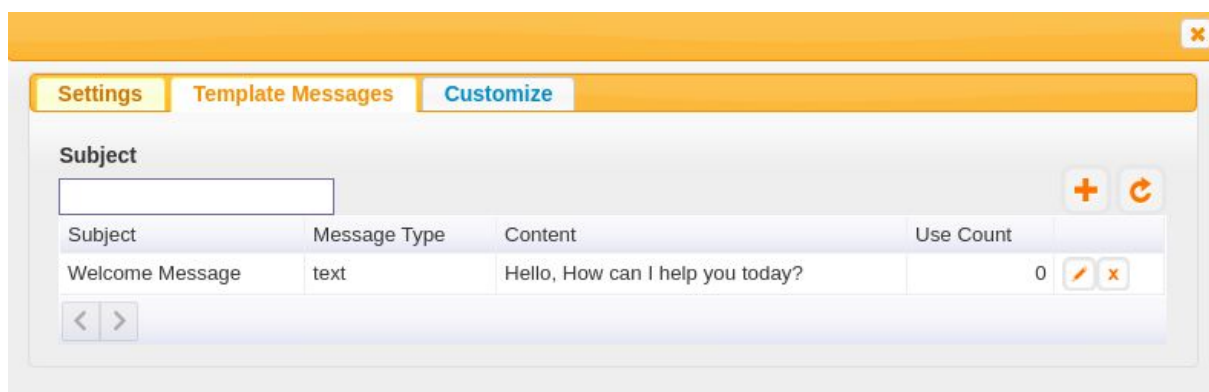


Sorting Priority


7. After all the necessary modifications have been made to the template message, click the save button, **Save**, after a pop-up window shown below will appear:

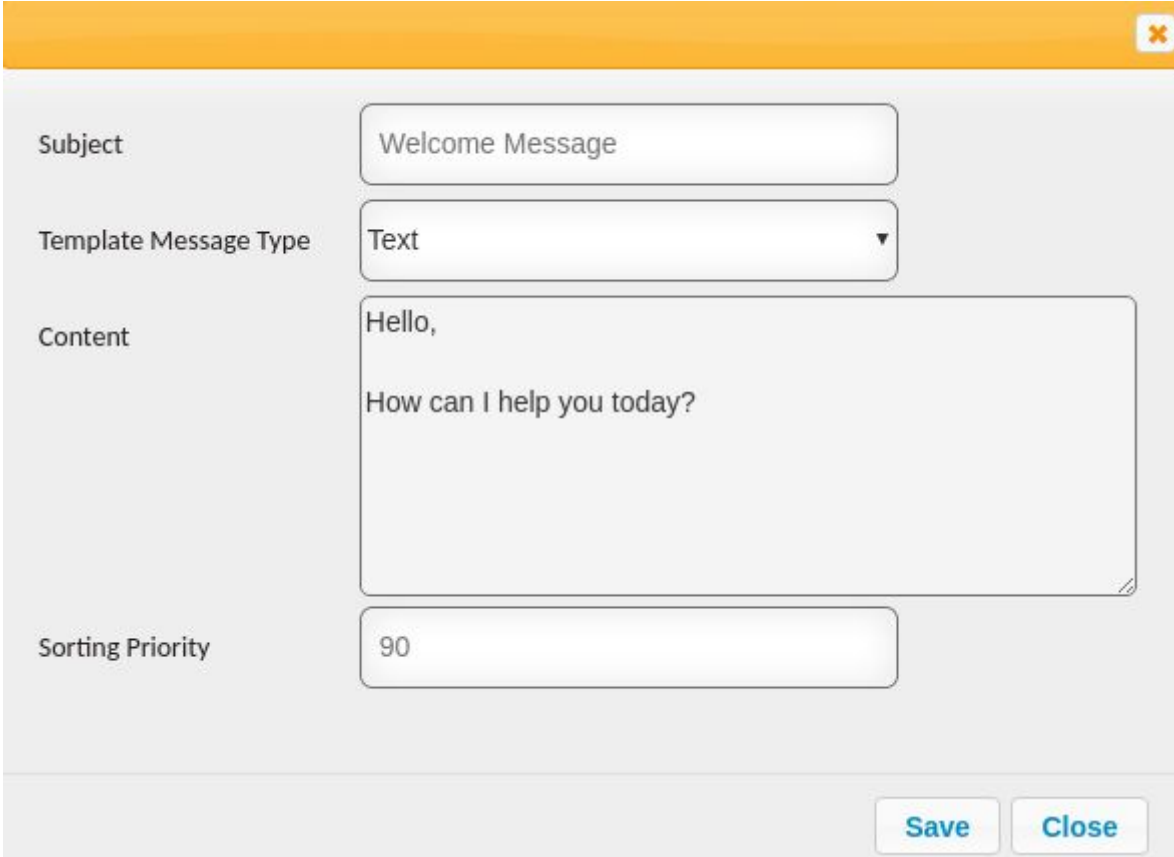


8. Click the Okay button, **Okay**, the created template message will appear in the template message name list as shown below:



Editing a Template Message

1. Click the edit button, , located to the right of the user count column, after clicking the following pop-up window will be displayed:



A pop-up window with an orange header bar containing a close button (X). The window has a light gray background and contains the following fields:

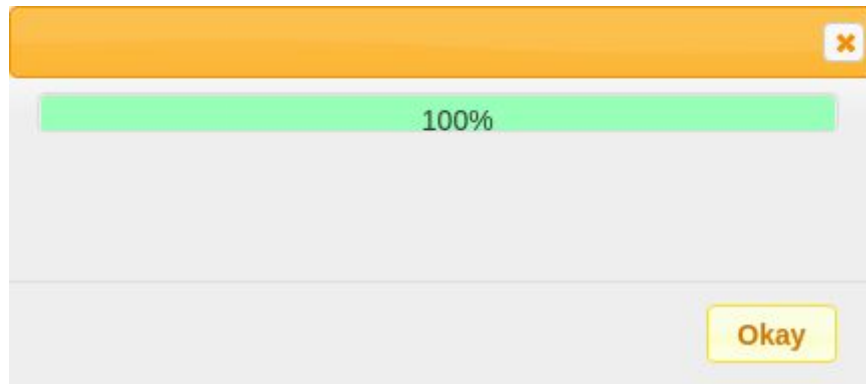
- Subject:** A text input field containing "Welcome Message".
- Template Message Type:** A dropdown menu showing "Text".
- Content:** A large text area containing "Hello," and "How can I help you today?".
- Sorting Priority:** A text input field containing "90".

At the bottom right of the window are two buttons: "Save" and "Close".

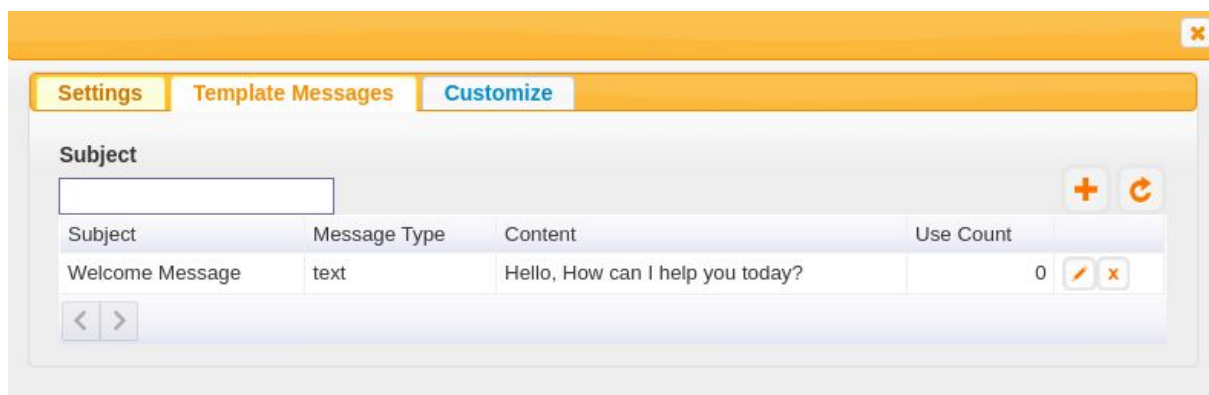
2. Make necessary changes to the template message (*See **Creating a Template Message** section*).

3. After all the necessary modifications have been made to the template message, click


the save button, **Save**, after a pop-up window shown below will appear:

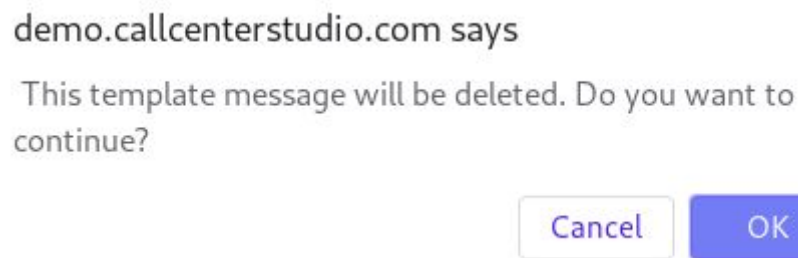


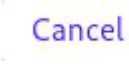

4. Click the Okay button, **Okay**, the edited template message will appear in the template message name list as shown below:



Deleting a Template Message

1. Click the delete button, , located to the right of the edit button. The following pop-up will be displayed:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

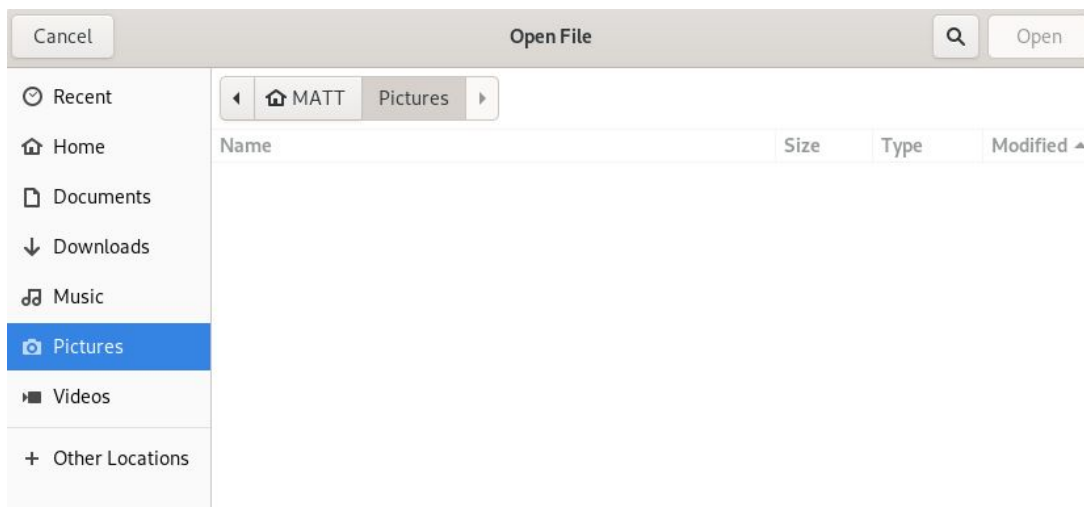
The screen will reload, and the deleted team will not be shown.

Searching for a Template Message

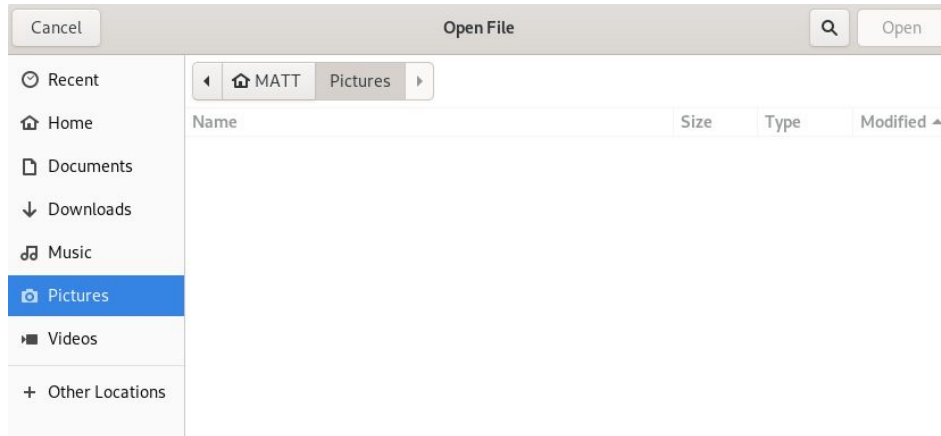
1. Click the “Search:” input box, type part of the subject, to filter the search results until the widget is located.



Creating a Chat Widget (Customize Tab)

1. From the settings tab, select the Customize tab, **Customize**.
2. To add a Widget logo, click the choose file option, **Choose File**, to the right of “Choose Chat Widget Logo,” the desktop folder will pop-up as shown below:



3. Select the desired image for the chat widget logo. JPEG, .PNG, & .JPG are acceptable formats.
4. To add a chat message Avatar, click the “Choose File” option, **Choose File**, to the right of “Choose Chat Message Avatar,” the desktop folder will pop-up as shown below:



5. Select the desired image for the chat message Avatar. JPEG, PNG, & JPG are acceptable formats.
6. If desired, to the right of “Use Agent Profile Avatar,” check the checkbox if desired to use the Agent Profile Avatar.
7. If custom HTML is desired, click the “Customize HTML” type the customized HTML. (Custom HTML: Webchat has a standard interface (two default versions, one customizable). However, a different interface may be desired. Call Center Studio has developed a library of customizable web chat versions that can be prepared, or the Call Center Studio Development team can also make one. The customized interface has an HTML file that needs to be written in this input box.)
8. Click the Save button,  , below the “Customize HTML” to save the customized HTML.
9. Click the save button,  , to the lower right-hand corner of the pop-up window to save the customize tab.

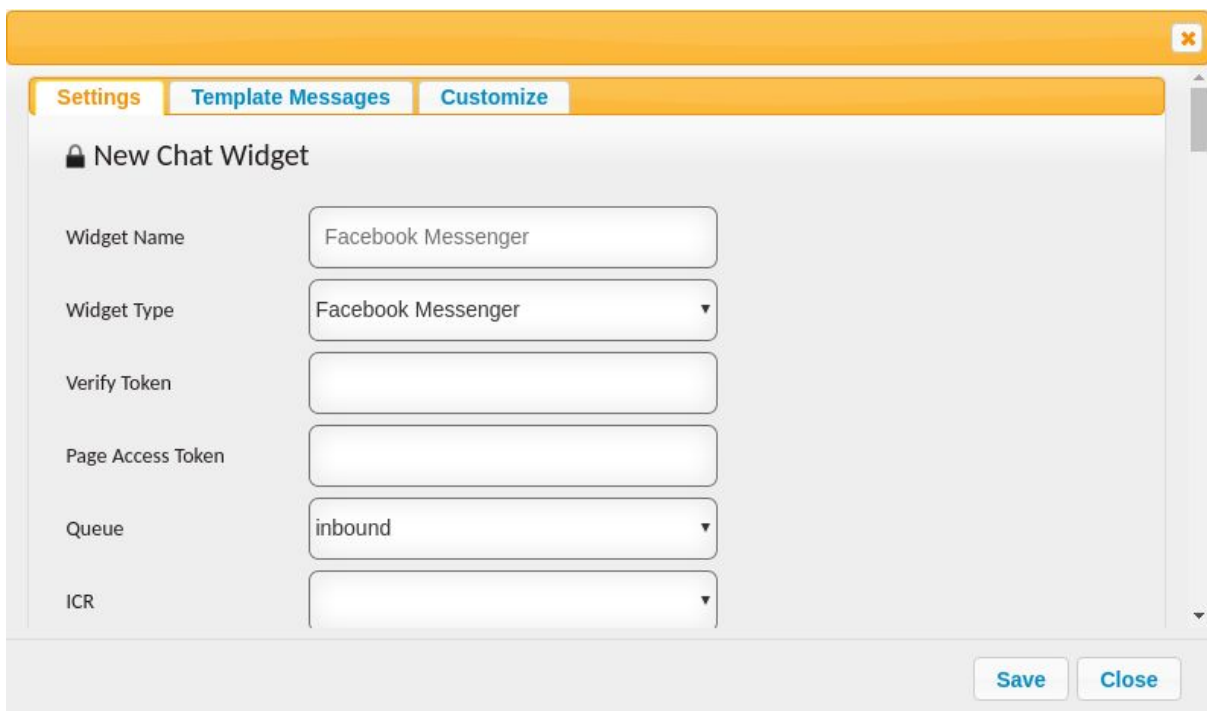
Editing a Chat Widget

1. To edit a chat widget, click the edit button, , located on the far right of the Chat

Widget as shown below:




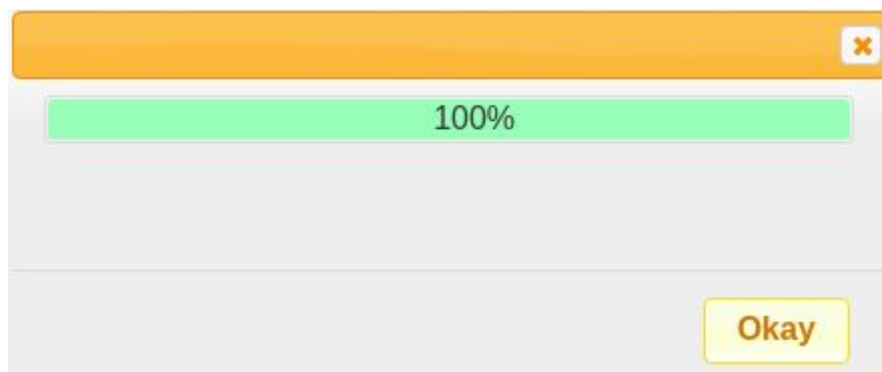
After clicking the edit button, the chat widget pop-up window will appear as shown:



2. Make the following changes and modifications to the chat widget as necessary (See the Creating Chat Widget Sections).

3. Once the desired changes have been completed, the information can be saved by



clicking the save button, , the following pop-up box will appear:

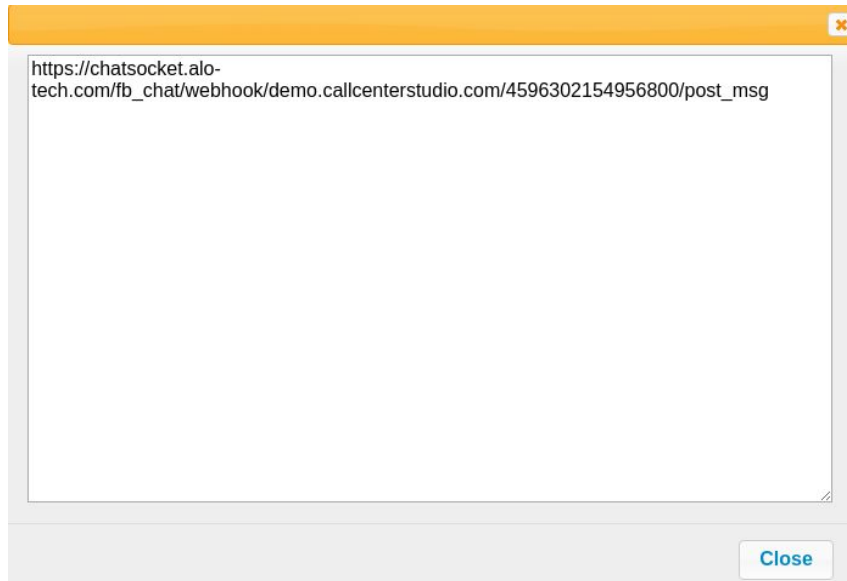


4. Click the Okay button, , to confirm the changes.

Chat Widget URL and Testing the Chat Widget

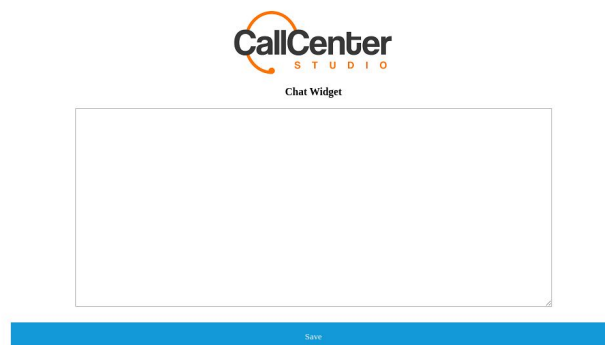
This URL is used for testing the chat widget:

1. To the left of the edit button, , click the show button, , the following pop-up will be displayed:



2. Click inside the window, highlight, and copy the entire URL.
3. Open a new tab using this URL: <http://chat-test.callcenterstudio.com/>.

The following screen will appear:




4. Paste the copied chat URL link into the input box on the chat test page. An example is shown below:



Chat Widget

```
<script type="text/javascript" src="//go-car.callcenterstudio.com/chat/alochat.js?
widget_key=ahRzfml1c3RlcmktaG16bWV0bG9yaXIYXILQ2hhdFdpZGdldHM4YyIC410eDrAoMogEbZ28tY2FyLmN
hbGxjZW50ZXJzdHVkaW8uY29t"></script>
<script type="text/javascript">
  startWidget();
</script>
```

Save

5. Click the save button, . The following will appear in the lower right-hand corner:



6. Click the green dot. The chat window will be displayed. An example is shown below:

Live Support

Name Surname

Email

Phone Number

Start Chatting

7. Fill out the Name Surname, Email (If optional was not checked), Phone Number (If optional was not checked)

-
- Click the Start Chatting button, , to begin testing the chat.

Searching for a Chat Widget

Name

- Click the “Name” input box, type the chat widget’s name, as shown below:


A screenshot of a web interface showing a search for chat widgets. On the left, there is a light gray rectangular box with the word "Name" in a light gray font. To the right of this box is a white input field with a thin gray border. Inside the input field, the text "Facebook Messenger" is typed, followed by a vertical cursor line.

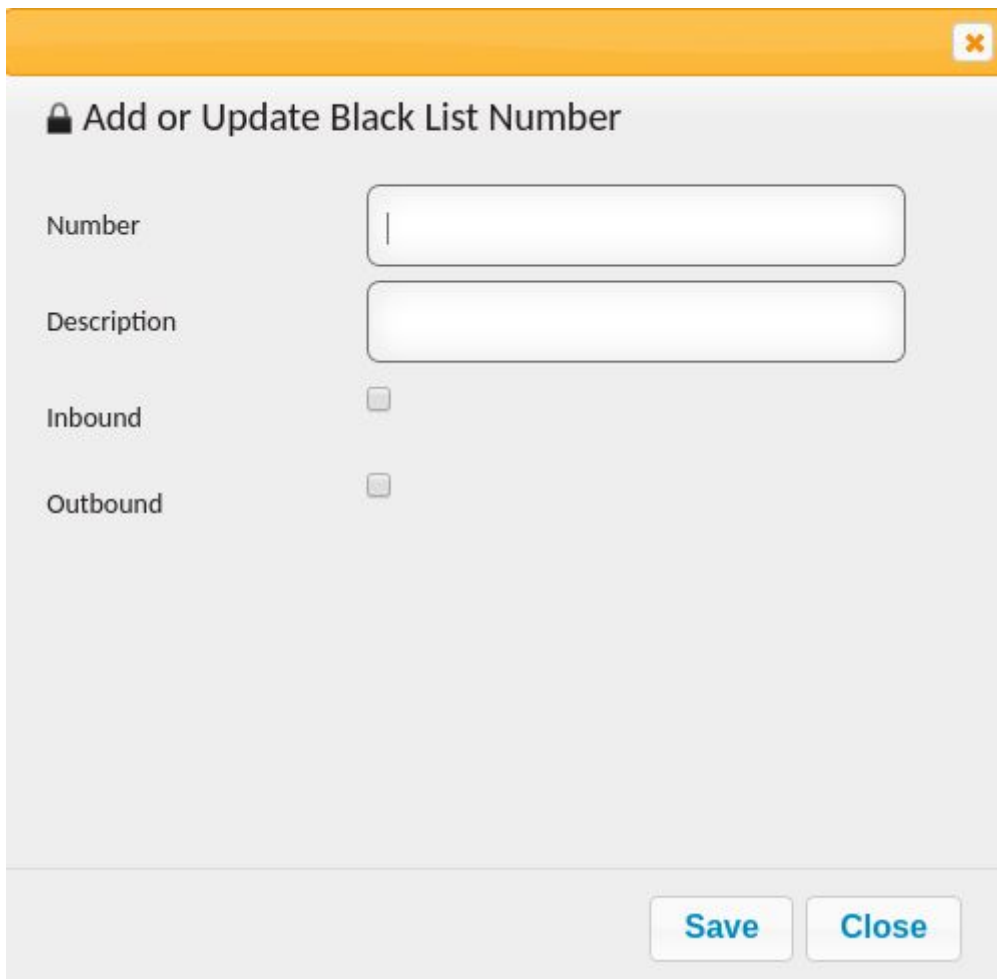
Note: Partial names can be used, when spelled correctly.


Black List



Adding a New Black List Number

1. Press the add button, , in the top right-hand corner of the Black List screen, the following pop-up will be displayed:



 **Add or Update Black List Number**

Number

Description

Inbound ☐

Outbound ☐

Save **Close**

2. Click the “Number” input box, type the blacklisted number an example is shown below:


Number	<input type="text" value="+17372129866"/>
--------	---

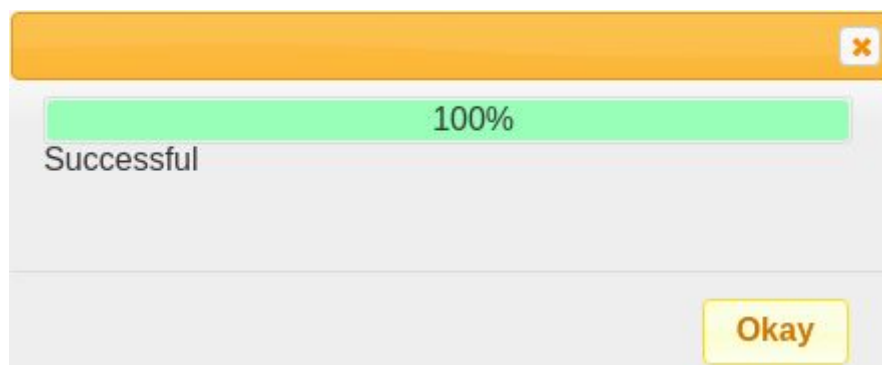
3. Click the “Description” input box, type a description if desired an example is shown below:

Description	<input type="text" value="John's Black List"/>
-------------	--

4. The number can be blocked from inbound or outbound calls by checking the inbound or outbound checkboxes an example is shown below:

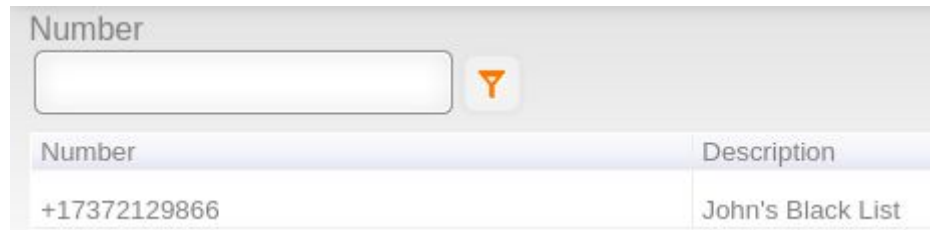
Inbound	<input checked="" type="checkbox"/>
Outbound	<input checked="" type="checkbox"/>

5. After additions have been made click the save button,  , the following pop-up will be displayed:




6. Click the Okay button, **Okay**, the blacklisted number will be shown in the Black

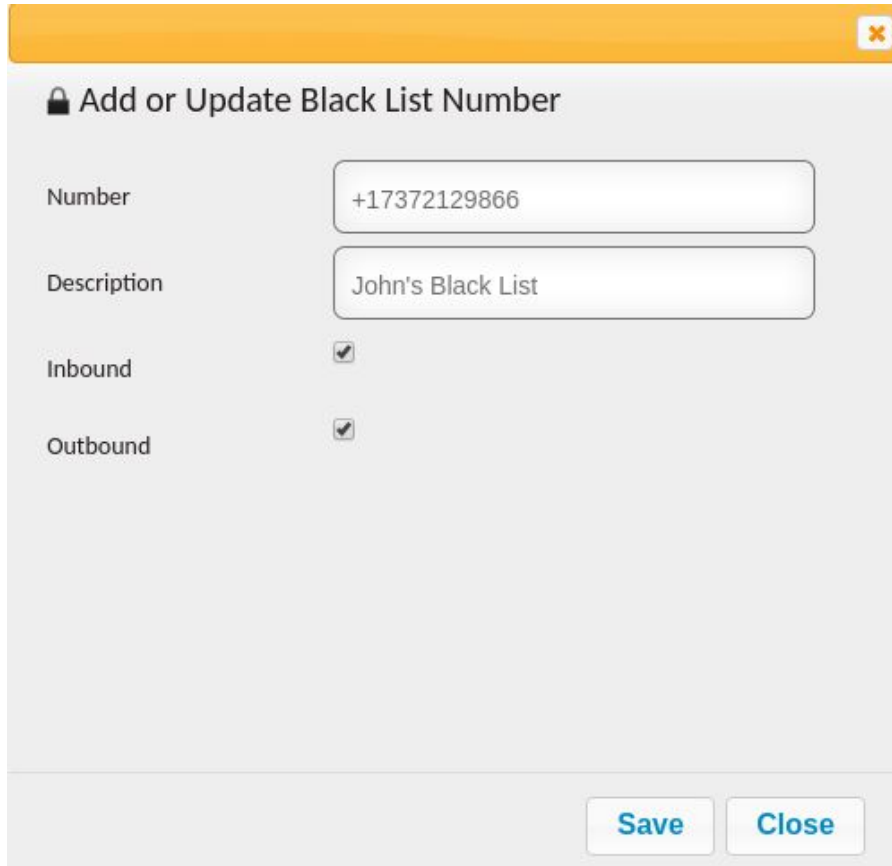
List name list the created example is shown below:

A screenshot of a software interface for managing a black list. At the top, there is a section labeled "Number" containing a text input field and a yellow button with a black funnel icon. Below this is a table with two columns: "Number" and "Description". The table contains one row with the number "+17372129866" and the description "John's Black List".

Number	Description
+17372129866	John's Black List

Editing a Black List Number

1. Click the edit button, , located to the right of the dialer column, after clicking the following pop-up window will be displayed:

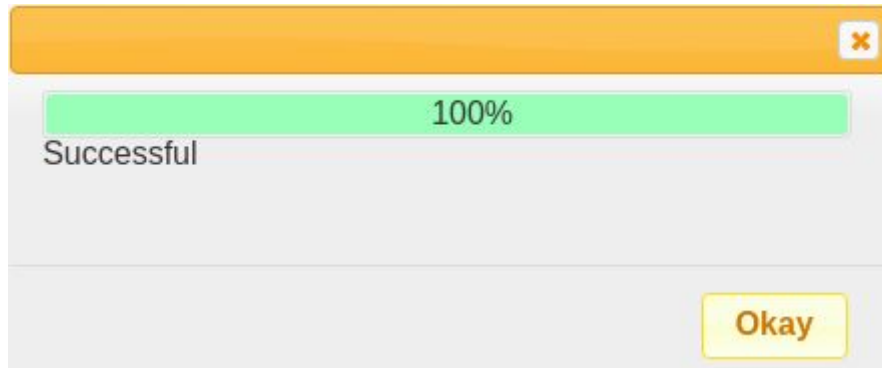


A pop-up window titled "Add or Update Black List Number" with a close button (X) in the top right corner. The window contains the following fields and controls:


- Number:** A text input field containing "+17372129866".
- Description:** A text input field containing "John's Black List".
- Inbound:** A checkbox that is checked.
- Outbound:** A checkbox that is checked.
- Buttons:** "Save" and "Close" buttons at the bottom right.

2. Make changes as desired.


3. After additions have been made click the save button, **Save**, the following pop-up will be displayed:

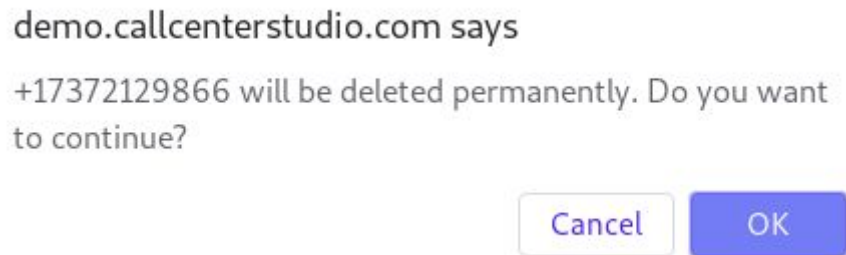



4. Click the Okay button, **Okay**, the blacklisted number will be shown in the Black List name list the created example is shown below:

Number	
<input type="text"/>	
Number	Description
+17372129866	John's Black List

Deleting a Black List Number

1. Click the delete button, , located to the right of the edit button. The following pop-up will be displayed:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

1. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted blacklisted number will not be shown.

Searching a Black List Number

1. Click the “Number” input box, type the blacklisted number an example is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular container. Inside, at the top left, is the label "Number" in a small, gray font. Below the label is a white rectangular input box with a thin gray border, containing the text "+17372129866". To the right of the input box is a small, square button with a light gray background and a yellow funnel icon.


Note: Partial numbers can be used. The filter button, , can also be used.

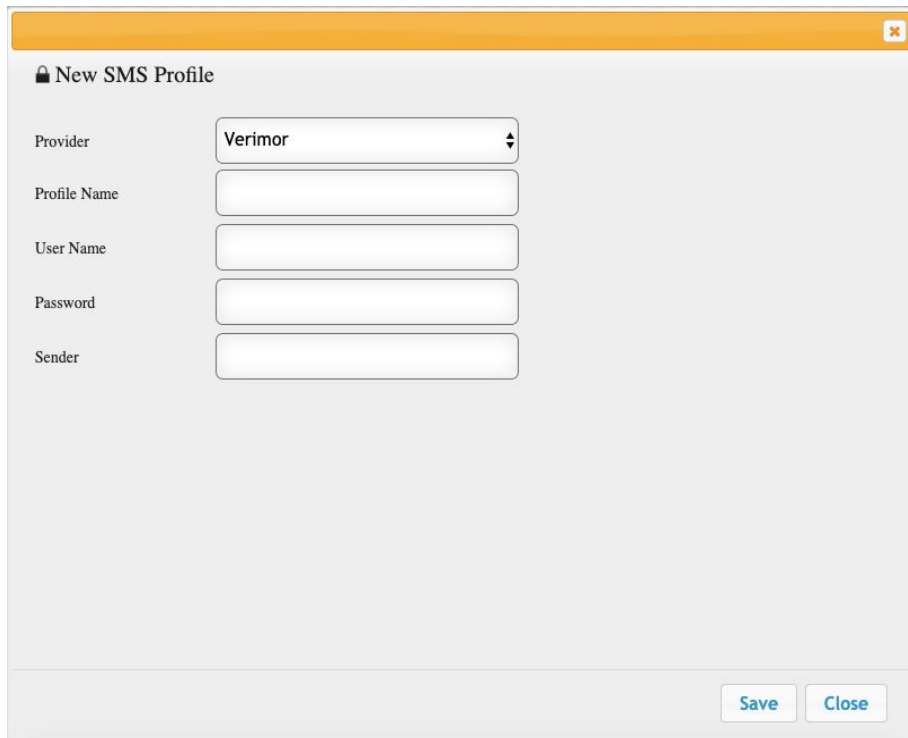
SMS Profiles



Used for setting up the SMS profile. Call Center Studio can integrate with other applications to send SMS messages to customers.

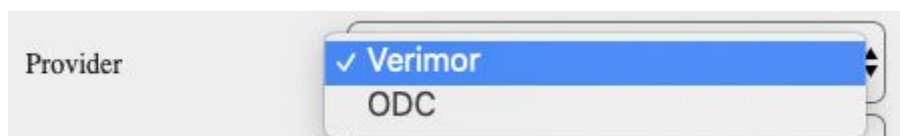
Adding an SMS Profile

1. Click the New button, , located in the top right corner of the screen. The following pop-up screen will appear as shown below, in the “Dialing Rule Name” input box, type the name of the dialing rule:



A screenshot of a web-based dialog box titled "New SMS Profile". The dialog has a light gray background and a thin orange border at the top. It contains five input fields arranged vertically on the left, each with a label and a corresponding input area on the right. The labels are "Provider", "Profile Name", "User Name", "Password", and "Sender". The "Provider" field is a dropdown menu with "Verimor" selected. The other four fields are empty text boxes. At the bottom right of the dialog, there are two buttons: "Save" and "Close".

2. Click the desired “Provider,” example of providers can be seen below, if down correctly, the selection will look like the picture below:



A close-up screenshot of the "Provider" dropdown menu. The label "Provider" is on the left. The dropdown menu is open, showing two options: "Verimor" and "ODC". The "Verimor" option is highlighted with a blue background and a white checkmark to its left. The "ODC" option is below it with a gray background.

-
- Click the “Profile Name” input box, type the SMS’s profile name in the layout shown below:

Profile Name	<input type="text" value="John"/>
--------------	-----------------------------------

- Click the “User Name” input box, type user name in the layout shown below:


User Name	<input type="text" value="johnsmitt@callcenterstudio.com"/>
-----------	---

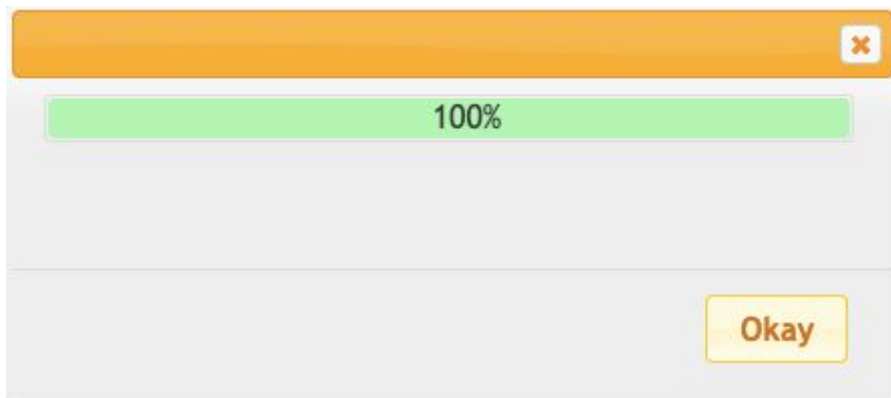
- Click the “Password” input box, type preferred password in the layout shown below:


Password	<input type="text" value="Sd1234."/>
----------	--------------------------------------

- Click the “Sender” input box, type sender name in the layout shown below:


Sender	<input type="text" value="Call Center Studio"/>
--------	---

7. After all the desired additions have been made, click the save button, , the following pop-up window will appear:



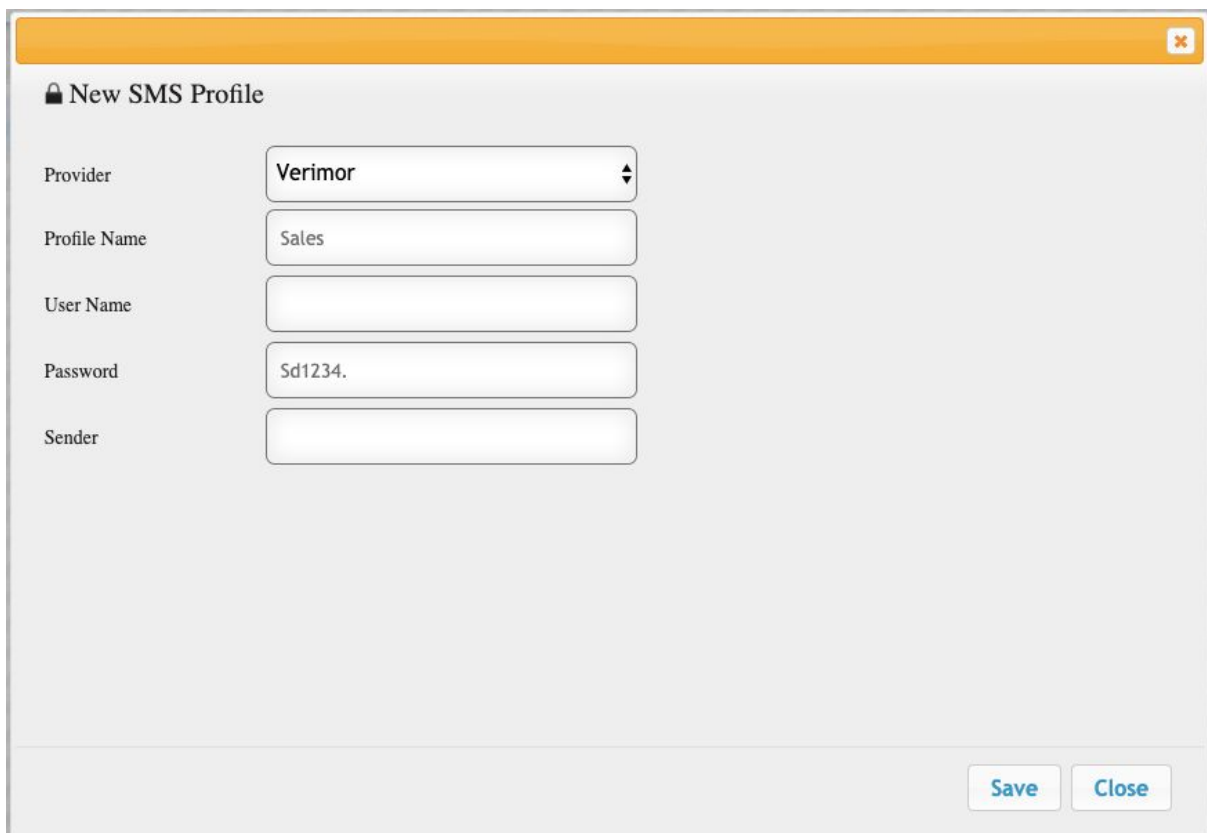
8. Click the Okay button, , the new SMS profile will be created.

Editing an SMS Profile

1. To edit an SMS profile, click the edit button, , located on the far right of the Profile Name after the “Credit Column” as shown below:




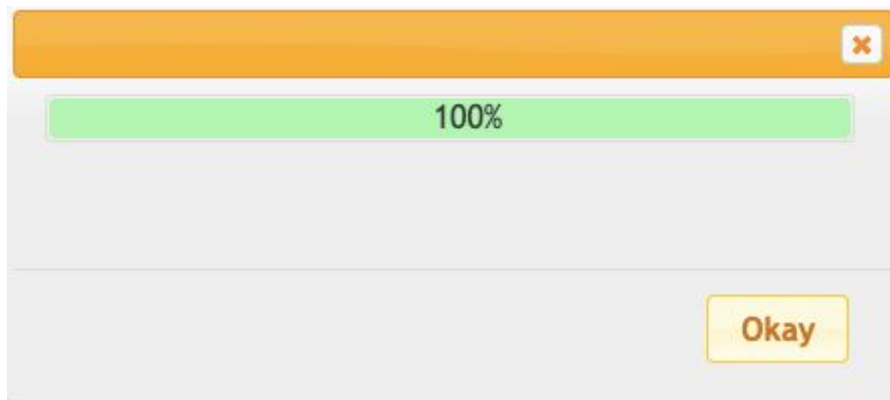
After clicking the edit button, the contact pop-up window will appear as shown:

A screenshot of a 'New SMS Profile' pop-up window. The window has a title bar with a close button. Inside, there is a form with the following fields: 'Provider' (a dropdown menu showing 'Verimor'), 'Profile Name' (a text box with 'Sales'), 'User Name' (an empty text box), 'Password' (a text box with 'Sd1234.'), and 'Sender' (an empty text box). At the bottom right, there are two buttons: 'Save' and 'Close'.

2. Make changes as desired.



-
3. Once the desired changes have been completed, the information can be saved by

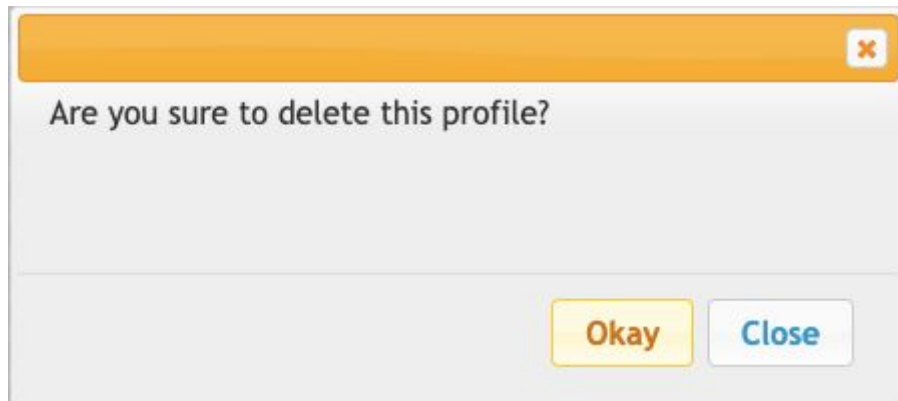
clicking the save button, , the following pop-up box will appear:





4. Click the Okay button, , to confirm the changes.

Deleting SMS Profiles

1. From the SMS profiles list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:





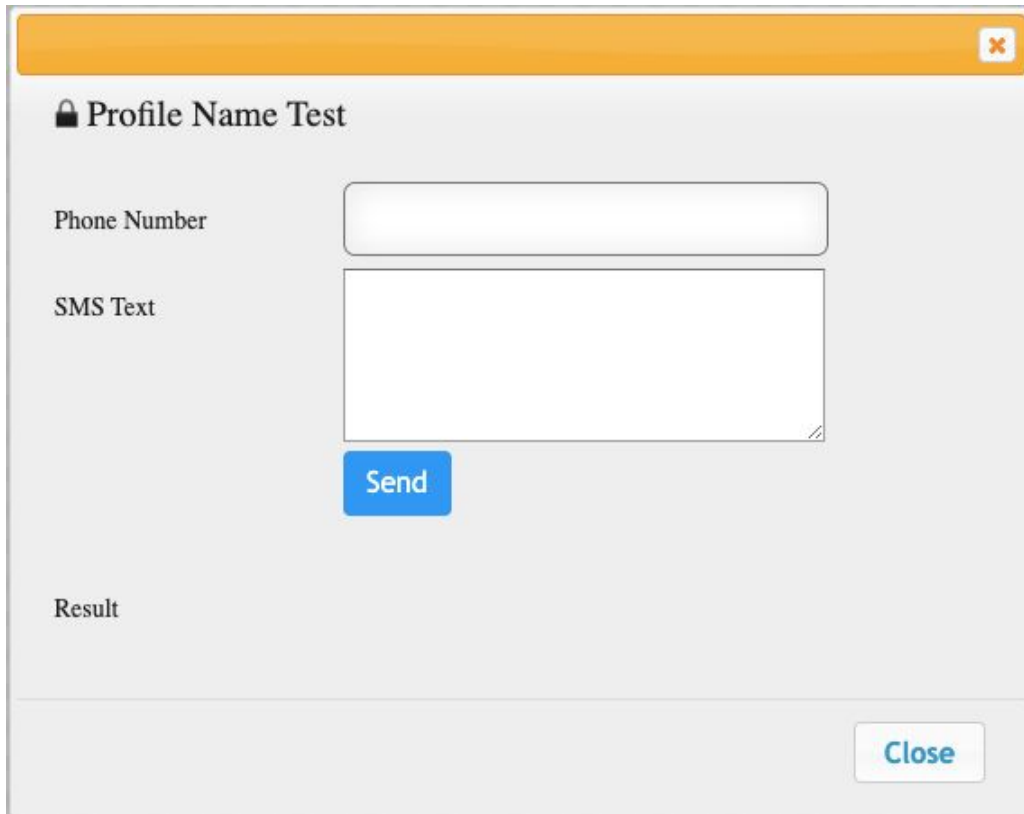
- Select the close button, , to cancel the deletion.
- Select the Okay button, , to confirm the deletion.

2. Confirm the deletion by clicking the Okay button, .

The screen will reload, and the deleted SMS profile will not be shown.

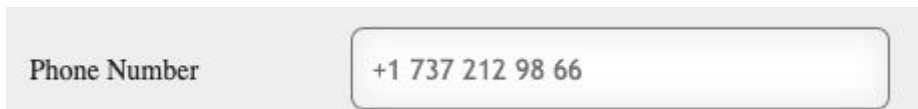
Testing an SMS Profile

1. From the SMS profiles list, click the delete button, , to the right of the delete button, . When the test button is clicked the following pop-up will appear:



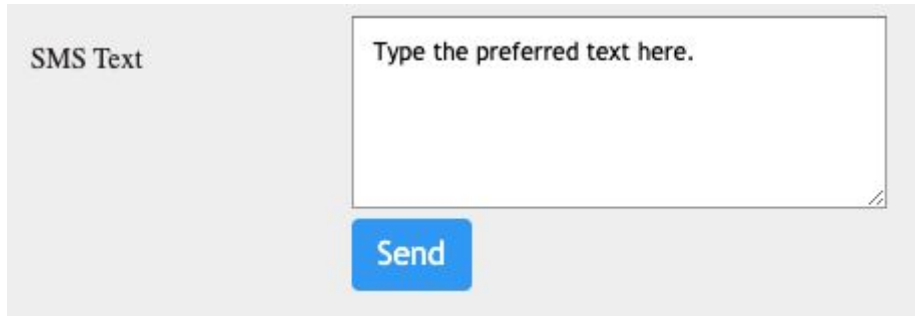
The screenshot shows a pop-up window titled "Profile Name Test" with a close button in the top right corner. Inside the window, there are two input fields: "Phone Number" and "SMS Text". Below the "SMS Text" field is a blue "Send" button. At the bottom left of the window is a "Result" label, and at the bottom right is a "Close" button.


2. Click the "Phone Number" input box, type the phone number which the SMS will be sent in the layout shown below:



The screenshot shows a close-up of the "Phone Number" input field. The text "+1 737 212 98 66" is entered into the field.

-
- Click the “SMS” input box, type the preferred SMS text in the layout shown below:

A screenshot of a user interface for sending SMS. On the left, the text "SMS Text" is displayed. To its right is a large, empty rectangular text input box with a thin border. Inside the input box, the placeholder text "Type the preferred text here." is visible. Below the input box is a blue rectangular button with the word "Send" in white text.


- Click the Send button, . If done correctly, to the right of the send button, the test result will be displayed.

Chatbot



A chatbot is a software application which regulates online chat conversations through the use of texts or texts to speech instead of providing direct contact with a live human agent.

Creating a chatbot

1. Click the new button, , located in the top right corner of the contact screen; the following pop-up screen will appear below:

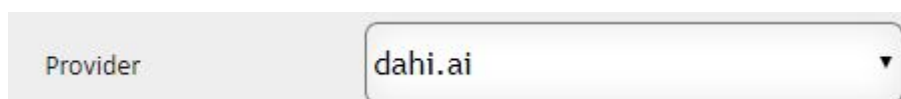


The image shows a pop-up window titled "Add/Edit Chatbot Profile" with a close button in the top right corner. The form contains the following fields:

- Provider:** A dropdown menu with "dahi.ai" selected.
- Profile Name:** An empty text input field.
- Token:** An empty text input field.
- Language:** A dropdown menu with "English" selected.
- IVR Bot:** A checkbox that is currently unchecked.
- Embed Code:** A large empty text area.

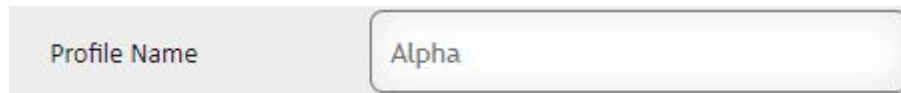
At the bottom right of the form are two buttons: "Save" and "Close".

2. Click the "Provider" input box, a dropdown list of available providers will appear, select the desired provider (Providers are set up by the Call Center Studio Development Team). An example is shown below.



The image shows a close-up of the "Provider" field from the previous form. It is a dropdown menu with "dahi.ai" selected and a downward arrow on the right side.

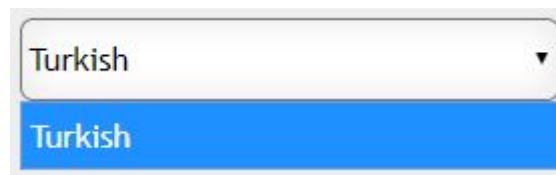
-
- Click the “Profile Name” input box, type the desired profile name of the chatbot; an example is shown below:

A screenshot of a form with a label "Profile Name" and an input box containing the text "Alpha".

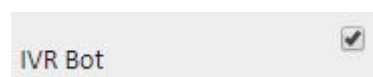
- Click the “Token” input box, type the desired token of the chatbot, an example is shown below:

A screenshot of a form with a label "Token" and an input box containing the text "123".

- Click the “Language layout,” a dropdown menu will appear showing the various languages available to choose from, as shown below:

A screenshot of a dropdown menu with "Turkish" selected and displayed in the input field. The dropdown list is open, showing "Turkish" as the only option.


- Click the “IVR Bot” checkbox if desired, as shown below:

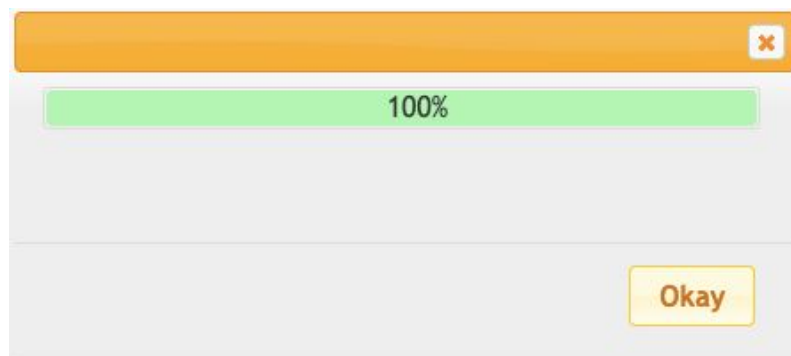
A screenshot of a form with a label "IVR Bot" and a checked checkbox.


Note: the IVR bot, also known as interactive bot response, is a telephony technology that can read a combination of touch-tone and voice input.

-
7. No input has to be made in the embedded code field, used in certain situations exclusively by the assigned Call Center Studio Project Manager.




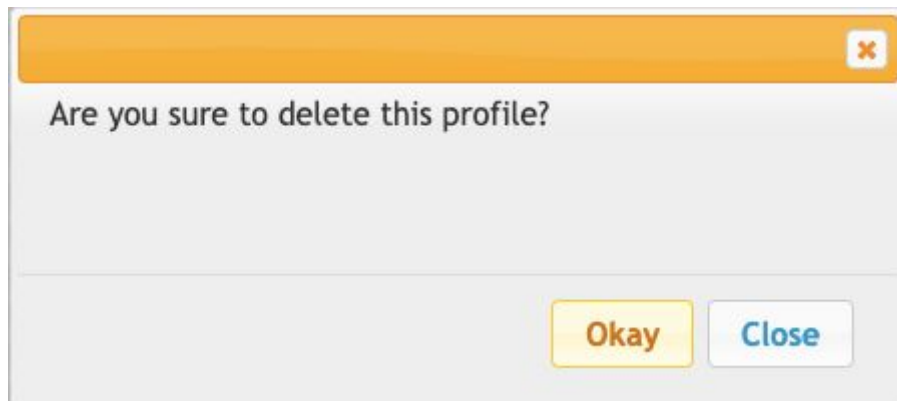
8. Once the desired changes have been completed, the information can be saved by clicking the ‘Save’ button, , the following pop-up box will appear:






9. Click the “Okay” button, , to confirm the changes.

Deleting Chatbot


1. From the chatbot list, click the delete button, , for the desired chatbot. When the delete button is clicked the following pop-up will appear:

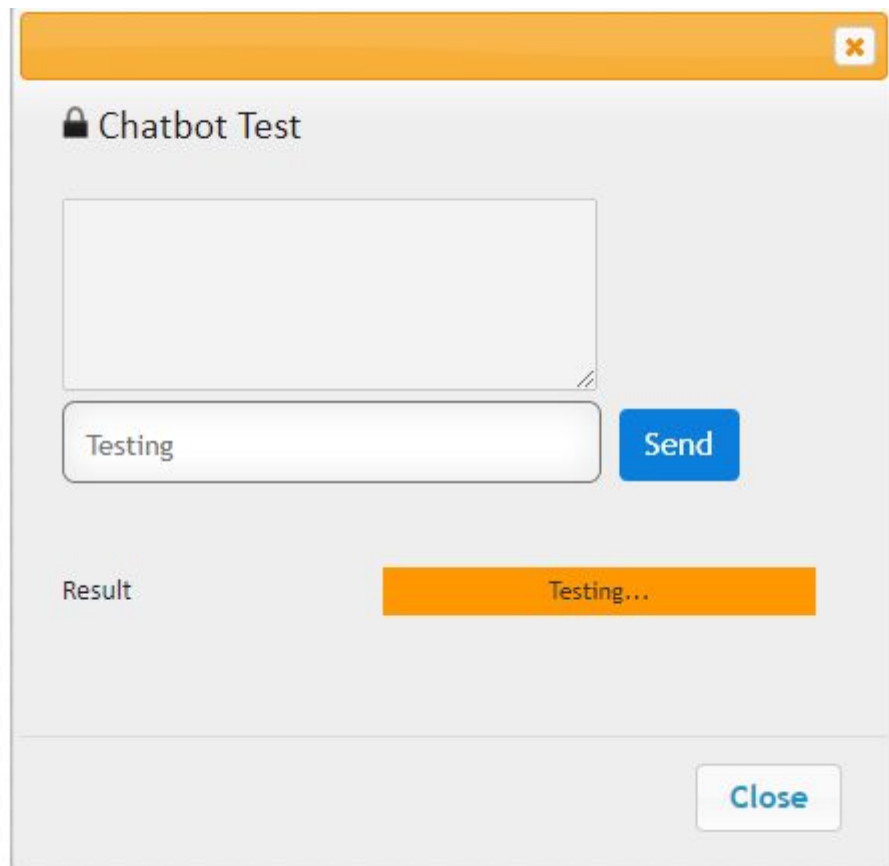


- Selecting the “Close” button, , will cancel the deletion.
- Selecting the “Okay” button, , will confirm the deletion.

2. Confirm the deletion by clicking the “Okay” button, .

Testing Chatbot

1. From the chatbot list, click the test button, , for the desired chatbot. When the test button is clicked the following pop-up will appear:



2. What for the result of the test, if positive, the chatbot is ready to use. If negative, please contact Call Center Studio Project Manager for further instructions.

Advanced Settings



The advanced settings section of the administrator module contains advanced settings that the administrator can customize and manage based on organizational preferences. The following section contains the list of advanced settings and the effects they have on the software.

Enter Secondary Mail for Quality Evaluation	Allows the administrator to input more than one email that will receive email notifications regarding agent quality evaluations.
Chat Limit	Assigns a number to the amount of concurrent chats.
Endpoint	The endpoint function is used to generate a deletion token for call recordings. If a deletion is required, please contact your Call Center Studio Project Manager.
Enter Mails for Automated Reports	Automated reports will be sent to the emails imputed here.

Session Timeout Duration	Allows the administrator to input a session timeout duration.
Automatic Log Off Time	Allows administrators to input automatic log off time.
Allow Viewing Active Incoming Call History at Agent Screen	Allows viewing active incoming call history at the agent screen
Agent Based Location	Allows for agent-based location
Allow Agents To Set Reserve Status	Allows agents to set reserve status.
Allow Agents To Download Their Own Voice Records	Allows agents to download their voice records.
Allow Selecting Available Status Without Successful Register	Allows selecting available status without a successful register.
Allow Agent Shortcuts	Allows agent shortcuts
Allow Outgoing Call During Chat	Allows agents to make an outgoing call during a chat.
Allow Agent to Listen Call Record	Allows agents to listen to call recordings.
Allow Supervisors To Change Teams	Allows supervisors to change teams.
Allow Supervisors To Set Reserve Status	Allows supervisors to set reserve status.

Anonymous Evaluation	Allows for anonymous evaluations
Click to Calls Can Only Be Made on The First Line	If the first call is inbound, this disables outbound calls from being made simultaneously.
DNIS ALL	During a crisis, If "ALL" is written in the DNIS input box in the incoming calls section, all the IVRs are changed. This function solves the problem of typing new IVR for all numbers one by one.
Allow Agents To View Reviews Tab And Receive Review Mails	Allows agents to view the reviews tab and receive reviews.
Open Status Limit	To enable status limit durations
Pause Operation	When Selected, pauses the entire operation.
Allow agents to send messages to the desired supervisor.	Allows agents to send messages to the desired supervisor.
Show AHT	This can be used to add inbound operation's AHT data to the report. If outbound operations are present, get in touch with Call Center Studio Team.
Show Custom Variables In Call Evaluation	Displays special variables returned in the

Screen	web service on the evaluation screen
Display Evaluations for Agent older than	Using the dropdown box will display agent evaluations ranging from 1 month, 3 months, 6 months, or ALL.
Tagging Timeout	Removes agent tags after a selected time period from calls using the dropdown box., normally used if repetitive tags are used too frequently.

When using search features for the Index titles shown below, case errors can occur.

Currently, Call Center Studio is not case sensitive; however, if a case error occurs, the “delete” and “create again” buttons can be used to reset the elastic search features.


Index	Transactions
Contacts	Active Create Again Delete
Users	Active Create Again
Chat Template Messages	Inactive Create Delete

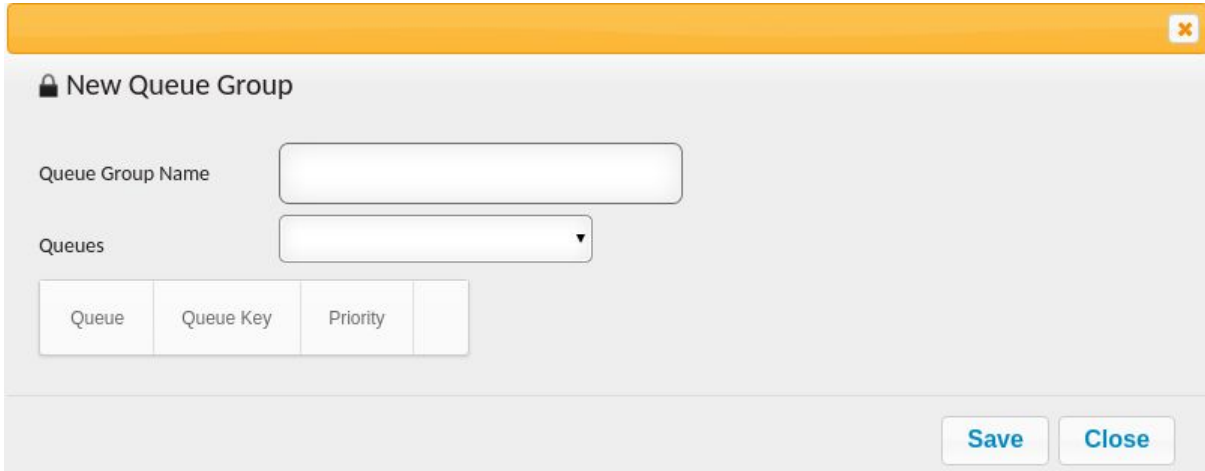
Queue Groups



A queue group can be formed to facilitate speed in adding users to multiple queues.

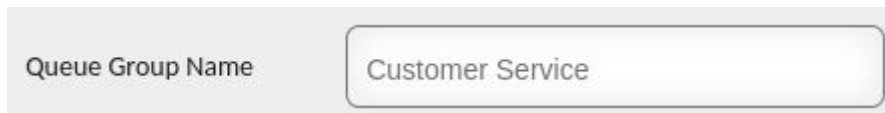
Creating a Queue Group

1. Click the new button,  , in the top right corner, the following pop-up screen will appear as shown below:



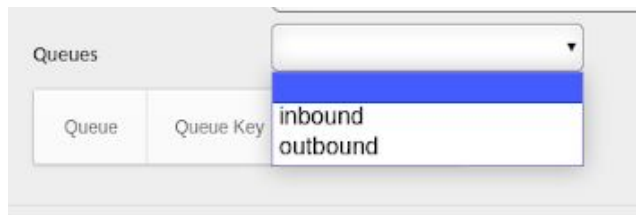
The image shows a pop-up window titled "New Queue Group" with a close button in the top right corner. Inside the window, there is a "Queue Group Name" text input field. Below it is a "Queues" dropdown menu. Under the dropdown is a table with four columns: "Queue", "Queue Key", "Priority", and an empty column. At the bottom right of the window are "Save" and "Close" buttons.

2. Click the “Queue Group Name” input box, type the desired queue group name an example is shown below:



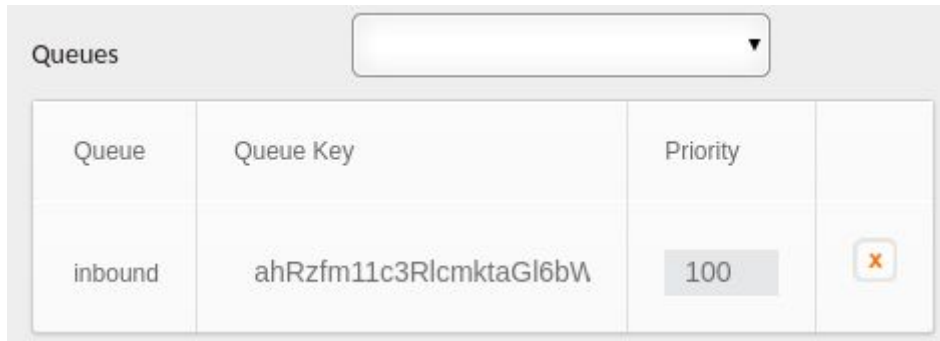
The image shows a close-up of the "Queue Group Name" input field with the text "Customer Service" entered.


3. Click the “Queues” input box, a dropdown list of created queues will appear (See Queue Section) an example is shown below:




The image shows a close-up of the "Queues" dropdown menu. The dropdown is open, showing a list of queues: "inbound" and "outbound". The "inbound" option is highlighted with a blue background.

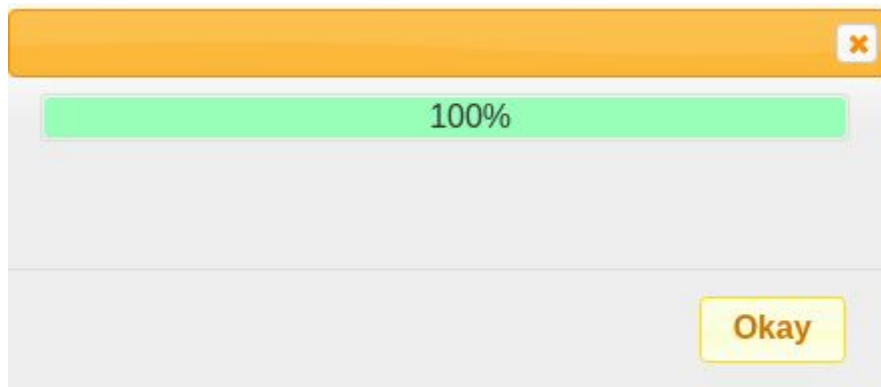
- Select the desired queue for the Queue Group to be applicable. An example selection is shown below:




Queue	Queue Key	Priority	
inbound	ahRzfm11c3RlcmktaGl6bV	100	

Note: The inbound queue was selected. The selection is listed in the table above with the following information: Queue, Queue Key (Automatically generated by the tenant), Priority.

- After all the desired queues are selected, click the save button, , the following pop-up window will be displayed:

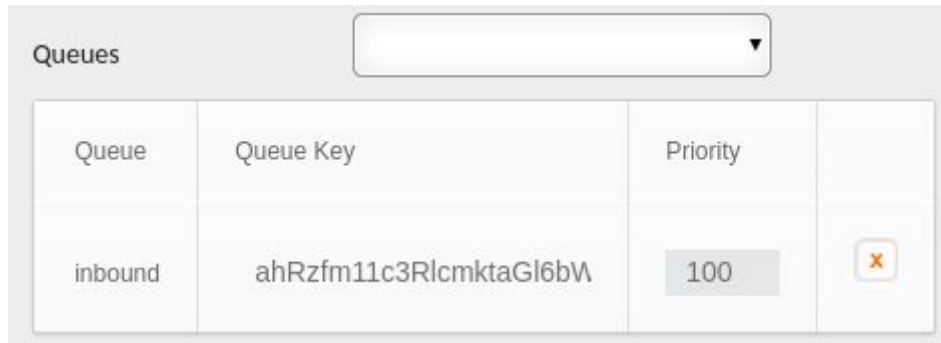



- Click the Okay button, , the created queue group name will appear in the queue group name list like the created example shown below:



Deleting a Queue from a Queue Group Name


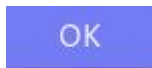
1. If a queue was selected, as shown below:



2. It can be deleted by clicking the delete button, , to the right of the Priority Column, once clicked the following pop-up will be displayed:

demo.callcenterstudio.com says
Queue will be deleted permanently.



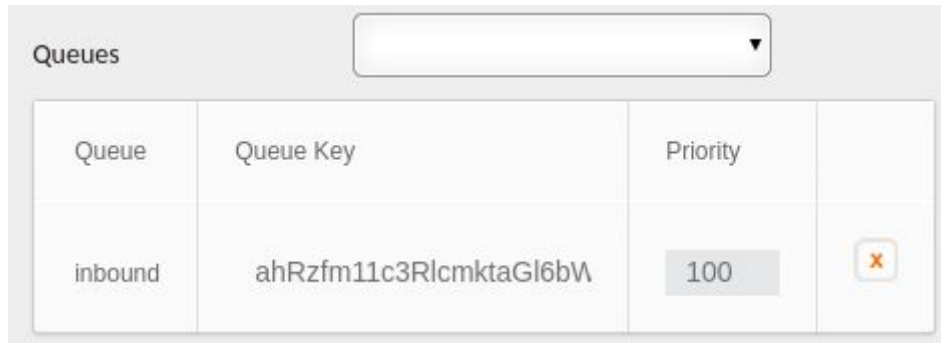
- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.


3. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted queue will not be shown.

Adjusting priority for a Queue Group Name on a Queue

1. Once a queue is selected, as shown below:



Queue	Queue Key	Priority	
inbound	ahRzfm11c3RlcmktaGl6bV	100	


2. Priority can be adjusted based on the Queue Group skills for a specific Queue default is 100 but if the Queue Group is still learning, the priority can be changed to a lower number such as 50 (this is how skill levels can be set) the Priority column contains up and down arrows on the number to adjust the skill level as shown below:

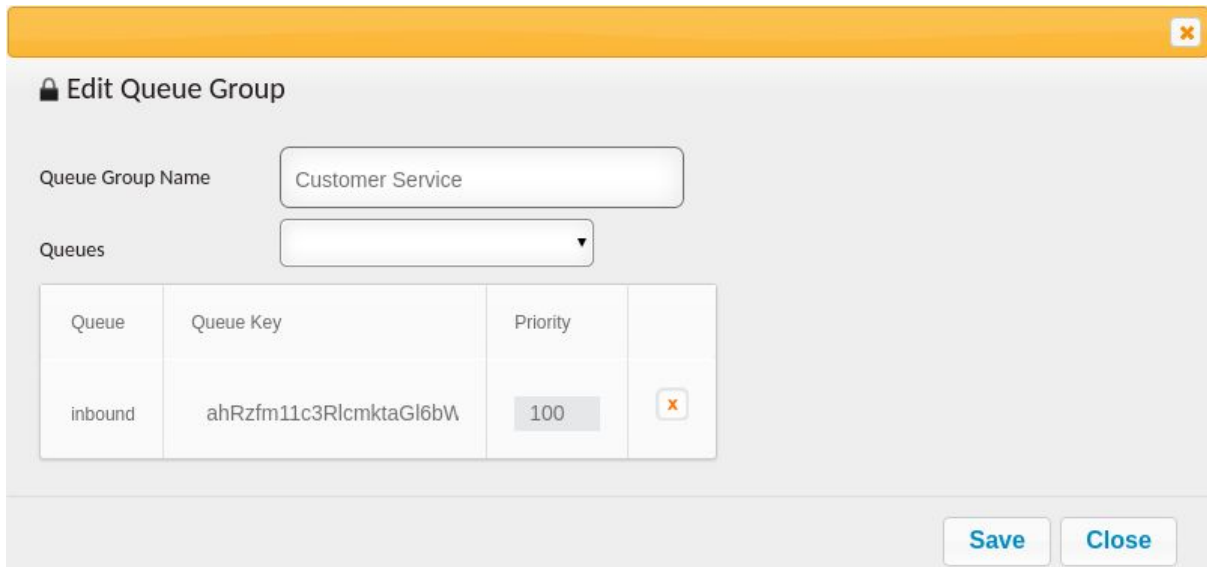


3. Toggle using the arrows until the desired skill level is selected an example is shown below:




Editing a Queue Group


1. Click the edit button, , located to the right of the queues column, after clicking the following pop-up window will be displayed:

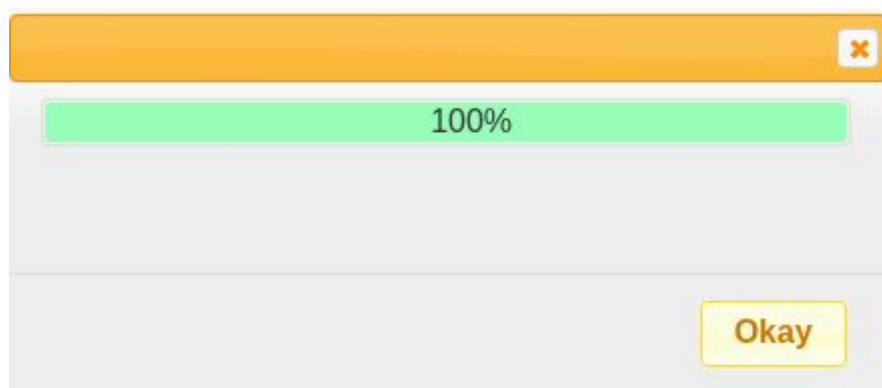


The 'Edit Queue Group' window has a title bar with a close button. It contains a 'Queue Group Name' field with the text 'Customer Service'. Below it is a 'Queues' dropdown menu. A table lists the queues:


Queue	Queue Key	Priority	
inbound	ahRzfm11c3RlcmktaGl6bW	100	

At the bottom right are 'Save' and 'Close' buttons.

2. Make the desired changes.
3. After all the desired changes are made, click the save button, , the following pop-up window will be displayed:





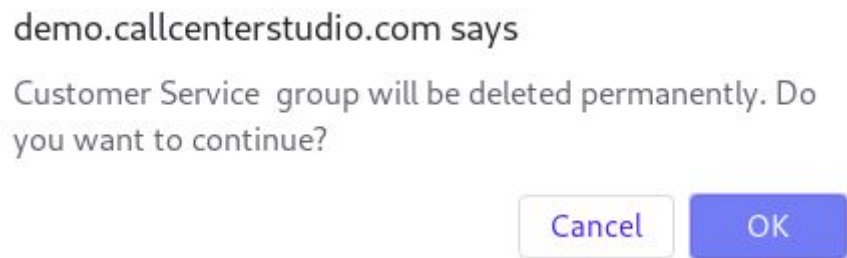
The completion window has a title bar with a close button. It features a green progress bar at the top with the text '100%'. At the bottom right is an 'Okay' button.



-
4. Click the Okay button, , the created queue group name will appear in the queue group name list like the created example shown below:

Group Name
Customer Service

Deleting a Queue Group

1. From the Queue Group name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Select the cancel button, , to cancel the deletion.
- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted queue group will not be shown.

Searching for a Queue Group

1. Click the “Group Name” input box, type the Group Name, as shown below:

A screenshot of a web interface showing a search input field. The field is labeled "Group Name" in a light gray font. To the right of the input field is a button labeled "Customer Service". The entire search area is enclosed in a light gray border.


Note: Partial names can be used, when spelled correctly.

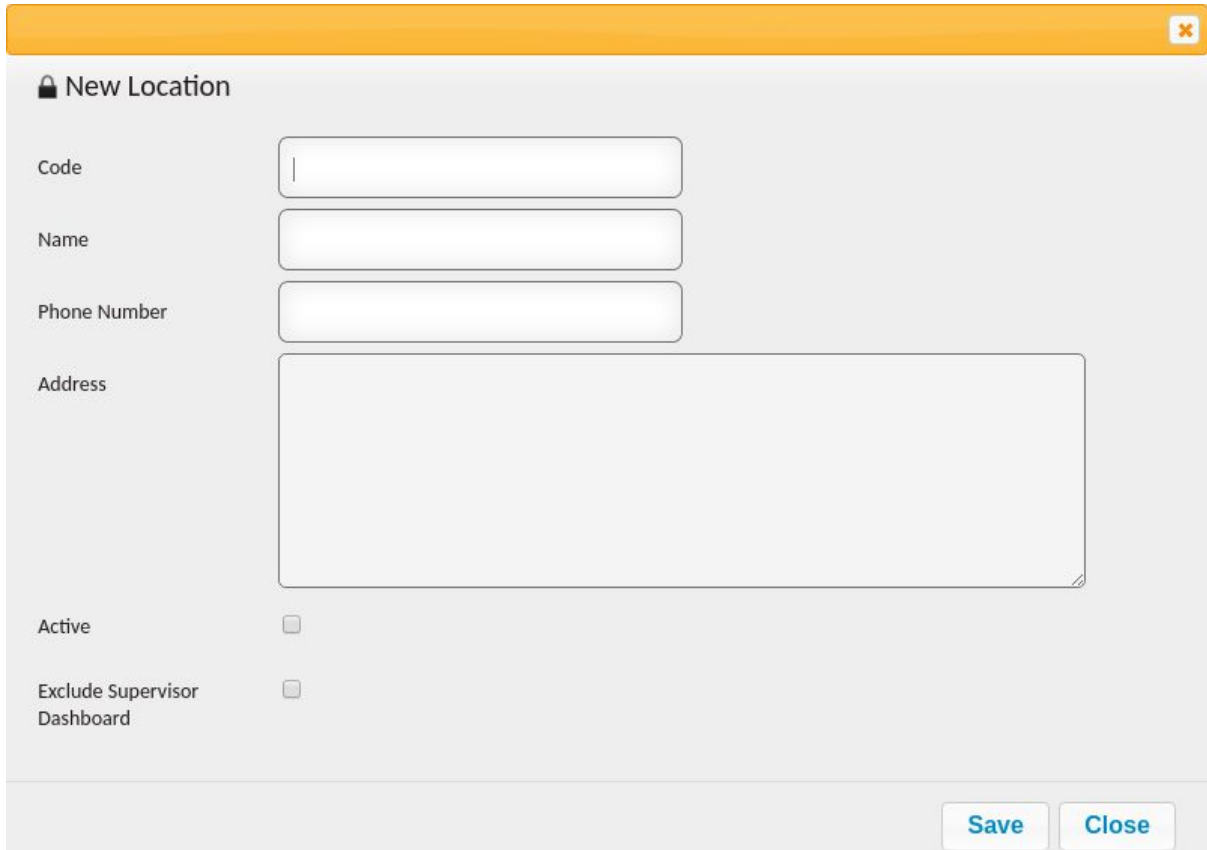
Location



Location is used to separate call center operations, using the same tenant. If a location is created and assigned to a queue, only supervisors from that specified location will have access to call records based on their queues assigned location. Typically used to help filter large amounts of call records based on location. It can also be used for outsourcers to separate client records.

Creating a Location

1. Click the new button, , in the top right corner of the screen. The following pop-up screen will appear, as shown below:



The image shows a pop-up window titled "New Location" with a close button in the top right corner. The form contains the following fields and options:

- Code:** A single-line text input field.
- Name:** A single-line text input field.
- Phone Number:** A single-line text input field.
- Address:** A multi-line text input field.
- Active:** A checkbox.
- Exclude Supervisor Dashboard:** A checkbox.
- Buttons:** "Save" and "Close" buttons at the bottom right.

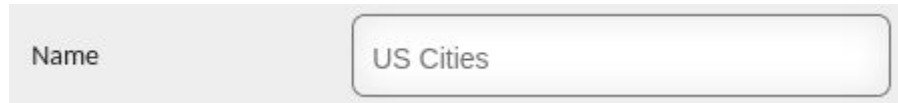
2. Click the "Code" input box, type the desired code an example is shown below:



The image shows a close-up of the "Code" input field with the text "USA" entered.

Note: Codes can be numbers or words. Once created, they can be inputted in a queue (See Queues Section for more information).

-
3. Click the “Name” input box, type the desired name an example is shown below:

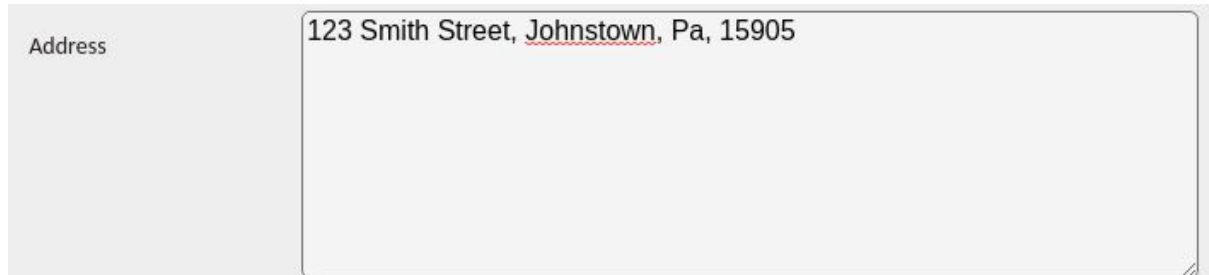
A screenshot of a form with a light gray background. On the left, the label "Name" is displayed in a dark gray font. To the right of the label is a white rectangular input box with rounded corners and a thin gray border. Inside the input box, the text "US Cities" is entered in a dark gray font.

4. Click the “Phone Number” input box, type the phone number an example is shown below:

A screenshot of a form with a light gray background. On the left, the label "Phone Number" is displayed in a dark gray font. To the right of the label is a white rectangular input box with rounded corners and a thin gray border. Inside the input box, the text "+18000000000" is entered in a dark gray font.

Note: Phone numbers can be added to generate more information based on the location. For example, if a location is based on a specified call center operation, the phone number of the operation can be inputted here.

5. Click the “Address” input box, type the address an example is shown below:


A screenshot of a form with a light gray background. On the left, the label "Address" is displayed in a dark gray font. To the right of the label is a large white rectangular input box with rounded corners and a thin gray border. Inside the input box, the text "123 Smith Street, Johnstown, Pa, 15905" is entered in a dark gray font. The word "Johnstown" is underlined with a red line.

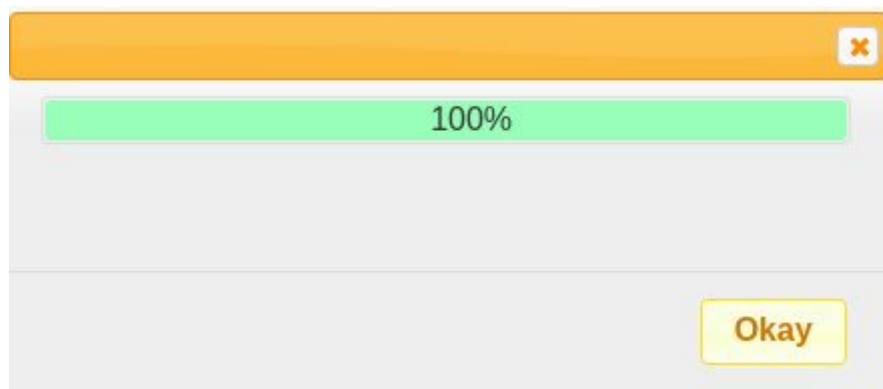
Note: Addresses can be added to generate more information based on the location. For example, if a location is based on a specified call center operation, the address of the operation can be inputted here.


6. After the “Address” input box, there are two checkboxes, select those that apply.

Explanations are given below:



Active	For the location code to be used within a queue, the active checkbox needs to be selected.
Exclude Supervisor Dashboard	If the Exclude Supervisor Dashboard checkbox is selected, the supervisor will not be able to view the quality control records from this location.

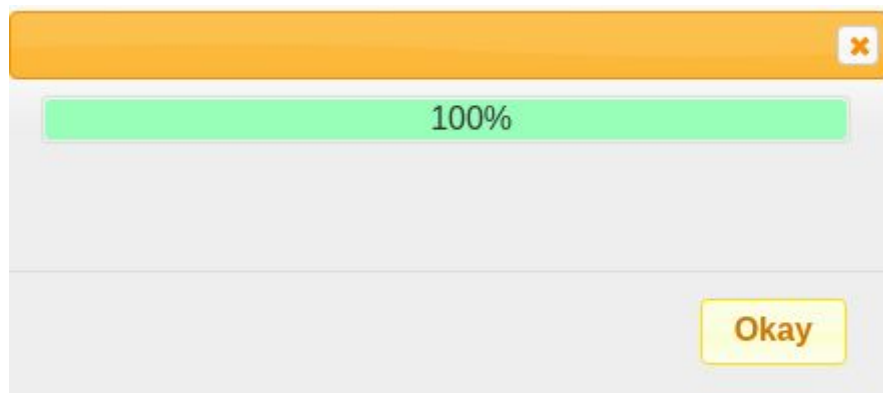
7. After all location additions have been made, click the save button, , the following pop-up window will be displayed:

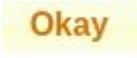


8. Click the Okay button, , the created queue group name will appear in the queue group name list.



Editing a Location

1. Click the edit button, , located to the right of the Exclude Supervisor Dashboard column.
2. Makes changes as desired
3. After all the desired changes are made, click the save button, , the following pop-up window will be displayed:





4. Click the Okay button, .

Deleting a Location

1. From the Location name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says
USA Location will be deleted permanently. Do you want
to continue?

CancelOK

- Selecting the cancel button, , will cancel the deletion.
- Selecting the OK button, , will confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted location will not be shown.

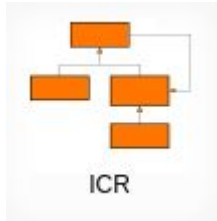
Searching for a Location

1. Click the “Name” input box, type the Location name as shown below:

A screenshot of a web form. On the left, there is a light gray rectangular box with the word "Name" in a dark gray font. To the right of this box is a white input field with a thin gray border. Inside the input field, the text "USA" is entered in a dark gray font.

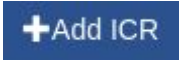
Note: Partial names can be used, when spelled correctly.

ICR



The Interactive Chat Response tab serves a similar function in chats that the Interactive Voice Response serves for phone calls. For example, a chat can be automated and routed to specific chat queues for agents to answer customer questions. Customers can be routed to a conditional chat system that answers consumer questions based on specified inputs.

Creating an ICR

1. Click the “Add ICR” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



ICR Name ×

ICR Name




2. Click the “ICR Name” input box, type the name of the ICR an example is shown below:



ICR Name ×

ICR




3. Click the “Save” button, , the following screen will appear with the name of the created ICR in the top left corner of the screen, as shown below:



Note: This is a partial screenshot of the screen that will appear, notice the name assigned in this example, “ICR,” is located in the top left corner. Also, the first step always follows the same format shown below:


Name assigned to ICR_Root

- Click the “Edit” button for the root step, , located to the right of the Next Step column, after clicking the following pop-up window will be displayed on the right-hand side of the screen:

Root Step Settings


Step Name	<input type="text" value="ICR_Root"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>
Chat evaluation	<input type="checkbox"/>
Chat Evaluation Whatsapp Message Duration	<input type="text" value="Chat Evaluation Message Duration"/>
Chat Evaluation Whatsapp Message	<div>Chat Evaluation Message</div>

- Click the “Step Name” input box, type the desired step name. (Note in all steps if a number is used, the ICR will display the steps in numerical order. For example, 1.ICR_Root)
- Click the “Description” input box, type the desired description.

-
7. The “Next Step” dropdown menu can be used to link up the next step. Next Steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the ICR and then linking the steps using the Next Step dropdown box.
 8. Click the “Announcement” input box, type the desired announcement.
 9. If Chat evaluation is desired, check the “Chat evaluation” checkbox. (used only for WhatsApp & Infobip chat widgets)
 10. Select the “Chat Evaluation Whatsapp Message Duration” input box type the desired time duration (Seconds)
 11. Select the “Chat Evaluation Whatsapp Message” input box type the desired message.
 12. Click the save button,  .

Adding Announcement Step

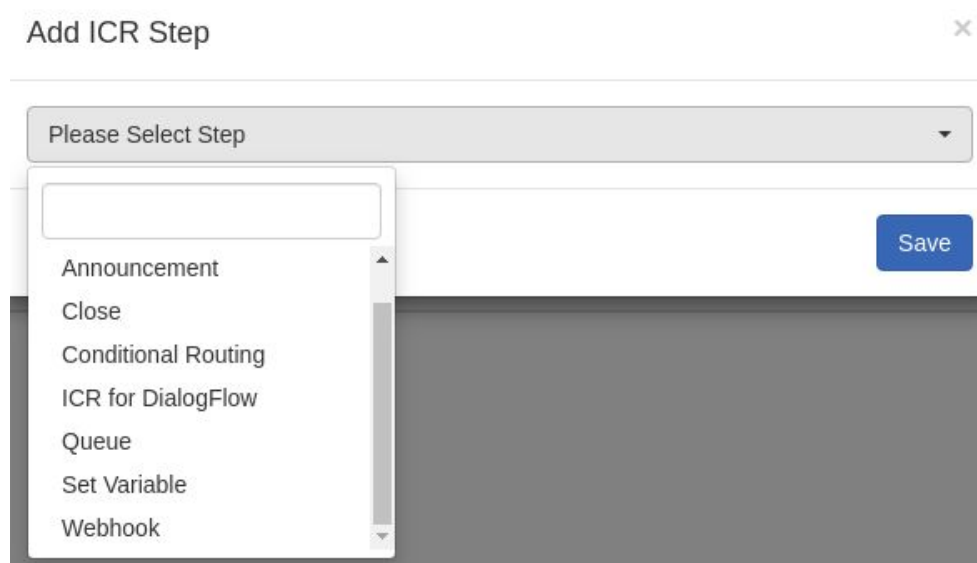
The announcement step is a message that the customer will receive. It can be used in multiple ways, for example, as the next step in a conditional routing selection.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" pop-up window, but the dropdown menu is now open, displaying a list of options: "Announcement", "Close", "Conditional Routing", "ICR for DialogFlow", "Queue", "Set Variable", and "Webhook". The "Save" button remains at the bottom right.

3. Select the “Announcement” step from the dropdown list; an example selection is shown below:

Add ICR Step

Announcement

Save


4. Click the Save button, , the following will appear on the right-hand side of the screen:

Announcement Step Settings


Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>

Save

Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Announcement” input box, type the desired announcement.
 9. Click the “Save” button,  .

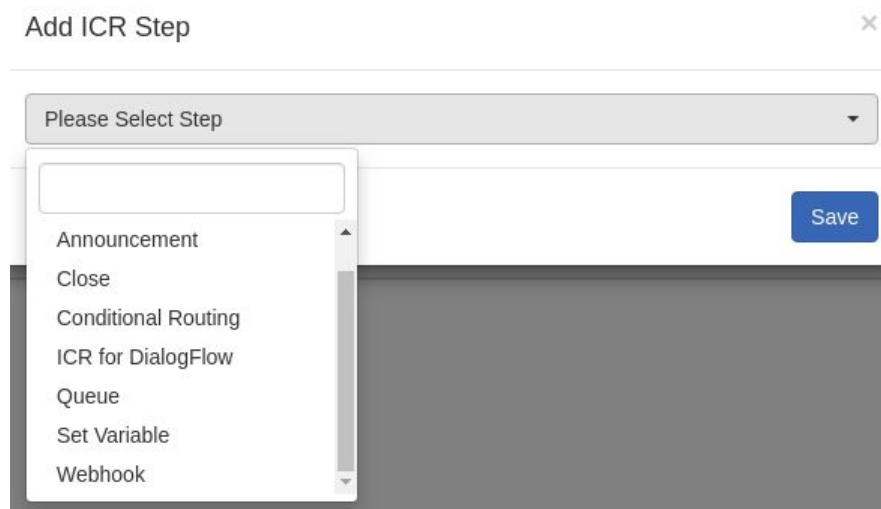
Adding Close Step

1. After creating a new ICR, click the “Add ICR” Step button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" pop-up window, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains visible at the bottom right.

3. Select the “Close” step from the dropdown list; an example selection is shown below:

Add ICR Step

Close

Save

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:


Close Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Announcement	<div><div>Announcement</div></div>

Save


Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. Click the “Announcement” input box, type the desired announcement, the customer will see before the chat closes.

8. Click the “Save” button,  .

Adding Conditional Routing Step

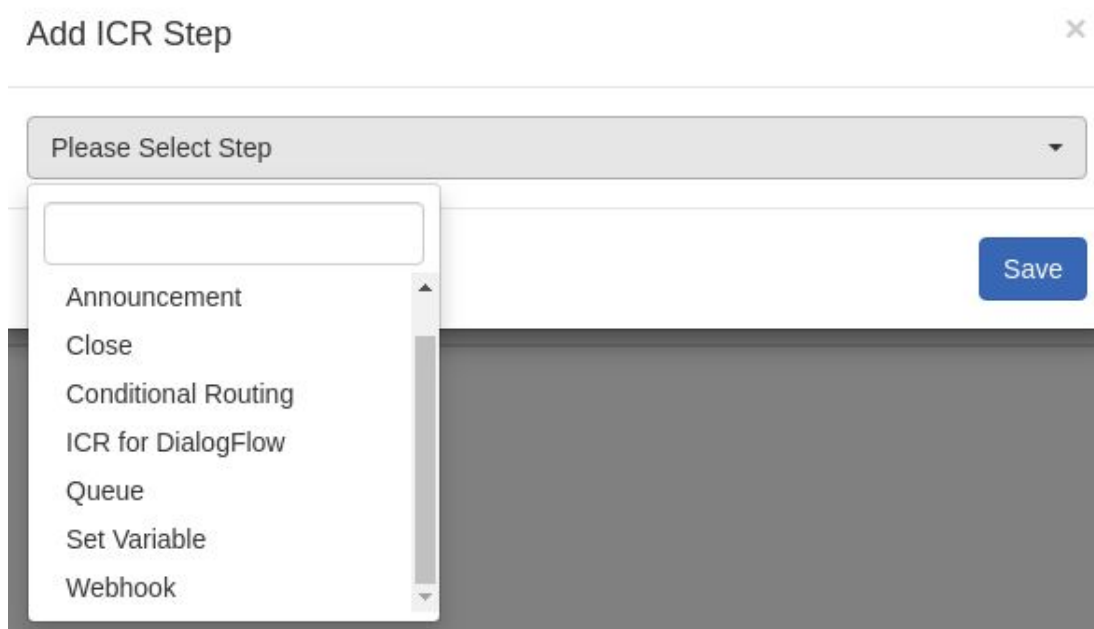
The conditional routing step allows the customer to make selections based on built-in conditions (Note: usually, a variable step is created before the conditional formatting step).

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



The same "Add ICR Step" pop-up window is shown, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

3. Select the “Conditional Routing” step from the dropdown list; an example selection is shown below:

Add ICR Step
×

Conditional Routing

Save

4. Click the “Save” button, Save, the following will appear on the right-hand side of the screen:



Conditional Routing Step Settings

Step Name	Step Name
Description	Description
Default Next Step	Please Select Next Step


Condition

Next Step



Save

Cancel

5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. The “Default Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box. (For conditional routing a default next step is not necessary)
8. Click the “New Step” button,  the following will appear:



9. The “Condition Name” input box is a formula based on the customer’s response. An example is shown below:

Note: This conditional formatting formula is based on the variable “mainmenu” created in a variable step, as shown below:

Set Variable Step Settings

Step Name	<input type="text" value="01.Main Menu"/>
Description	<input type="text" value="Description"/>
Set Variable Name	<input type="text" value="mainmenu"/>

Note: See Variable Step Section for creating a variable step. In this step, if the customer inputs the number “1,” the customer will be transferred to step defined below:

-
10. Click the dropdown menu under the “Condition Name” input box. (Note: Normally this is done after all the steps are completed, to link the conditional routing with the next steps). An example is shown below:

A screenshot of a dropdown menu. The text "02.Enter the Credit amount" is displayed inside a light gray rectangular box with a thin border. A small downward-pointing arrow is visible on the right side of the box.

Note: In this example, if the customer inputs “1” then, the customer will be transferred to “02.Enter the Credit amount” step.


11. Repeat steps 8-10 until the desired amount of conditional formatting steps is reached.



12. Click the save button, .

Adding ICR DialogFlow Step

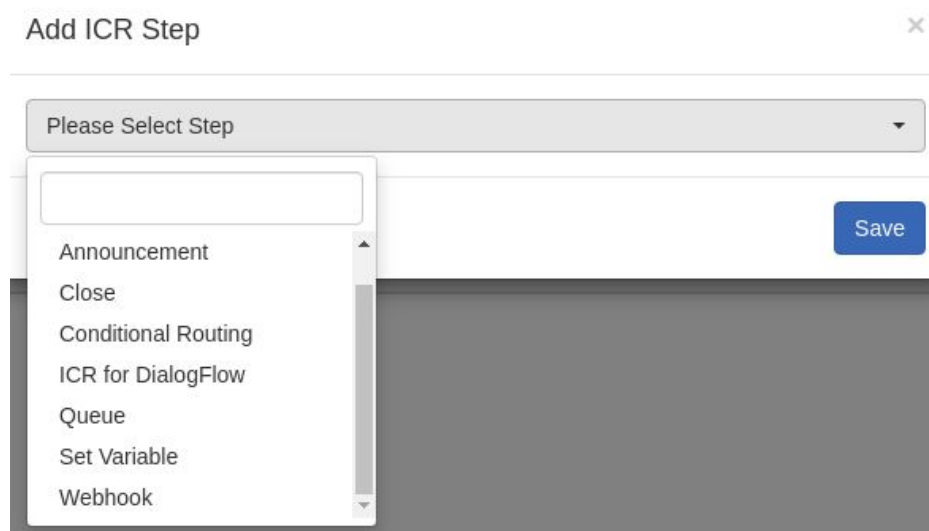
A chatbot can be created using Google Dialogflow. By creating this step, the desired language of the dialog flow can be used by the customer for ease of communication with the agent. Google Dialogflow transmits the conversation's responses into each user's preferred language.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The dialog box titled "Add ICR Step" has a close button (X) in the top right corner. It contains a dropdown menu with the text "Please Select Step" and a blue "Save" button at the bottom right.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The dialog box titled "Add ICR Step" shows the dropdown menu open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains visible at the bottom right.

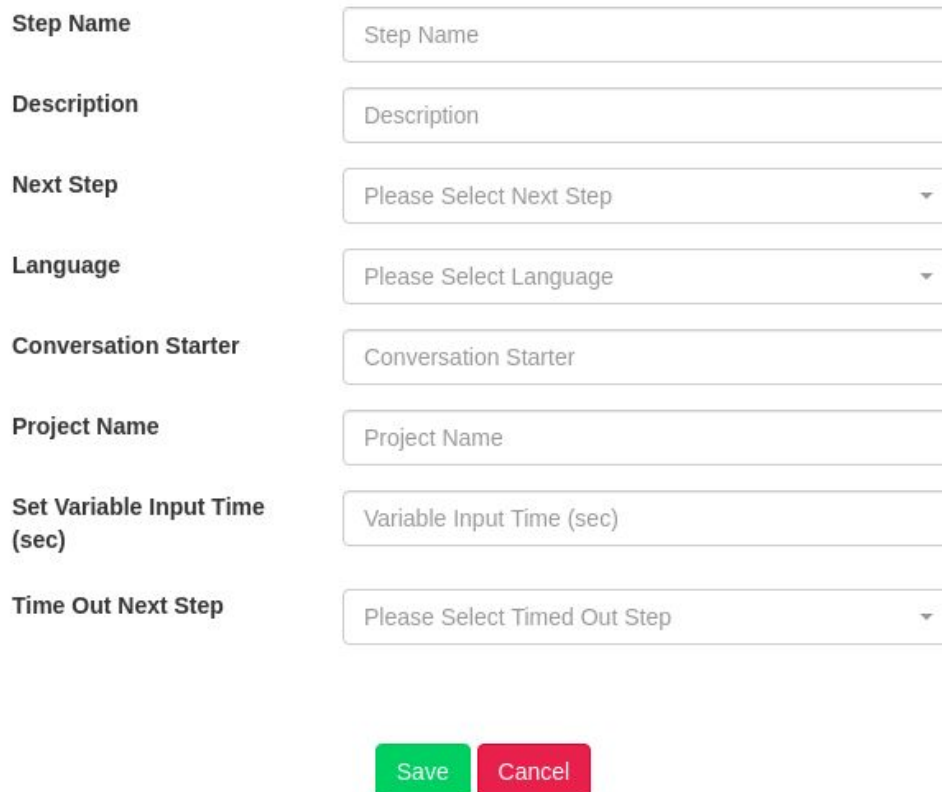
3. Select the “ICR for DialogFlow” step from the dropdown list; an example selection is shown below:



A dialog box titled "Add ICR Step" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu with "ICR for DialogFlow" selected. Below the dropdown is a blue "Save" button.

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

ICR for DialogFlow Step Settings



A form titled "ICR for DialogFlow Step Settings" with the following fields:


Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Language	<input type="text" value="Please Select Language"/>
Conversation Starter	<input type="text" value="Conversation Starter"/>
Project Name	<input type="text" value="Project Name"/>
Set Variable Input Time (sec)	<input type="text" value="Variable Input Time (sec)"/>
Time Out Next Step	<input type="text" value="Please Select Timed Out Step"/>

At the bottom of the form are two buttons: a green "Save" button and a red "Cancel" button.

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Language” dropdown menu, select the desired language.
 9. Click the “Conversation Starter” input box, type the desired conversation starter. It is the first sentence the customer sends to the chat.


Note: For a generic string to trigger the Dialogflow type: \$initial_message

10. Click the “Project Name” input box, type the desired project name. (ID of the dialog flow project opened on behalf of the customer in Google Cloud Platform.) (Contact the assigned Call Center Studio Project Manager for the Project Name.)
11. Click the “Set Variable Input Time (sec)” input box, type the desired timeout period.
12. The “Time Out Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.

13. Click the “Save” button, .

Adding Queue Step

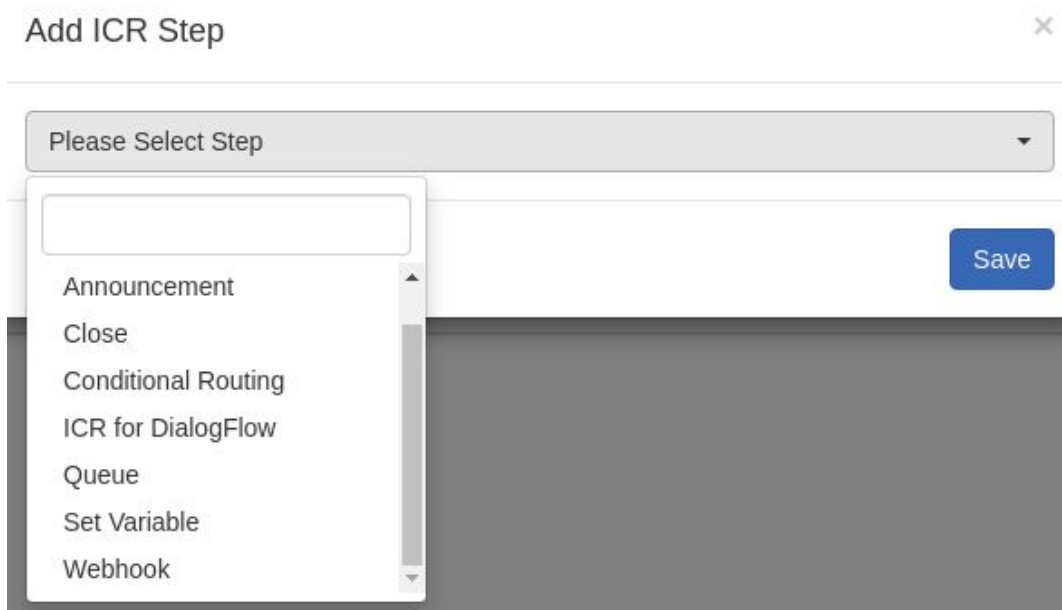
The queue step is used to connect a customer with the appropriate chat queue. (Note: it can be used after a conditional routing step to send the customer to the appropriate chat queue).

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The same "Add ICR Step" pop-up window is shown, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

3. Select the “Queue” step from the dropdown list, an example selection is shown below:

Add ICR Step

Queue

Save


4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

Queue Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<div>Please Select Next Step</div>
Queue	<div>Please Select Queue</div>
Enable Reserved Agent	<input type="checkbox"/>
Reserved Agent	<input type="text" value="Reserved Agent"/>


Save

Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Queue” dropdown menu, select the desired chat queue.
 9. A reserve agent can be enabled if desired by checking the “Enable Reserved Agent” Checkbox.
 10. If the “Enable Reserved Agent” checkbox is selected, type the reserve agent’s name.
 11. Click the “Save” button,  .

Adding Out of Working Hours Step

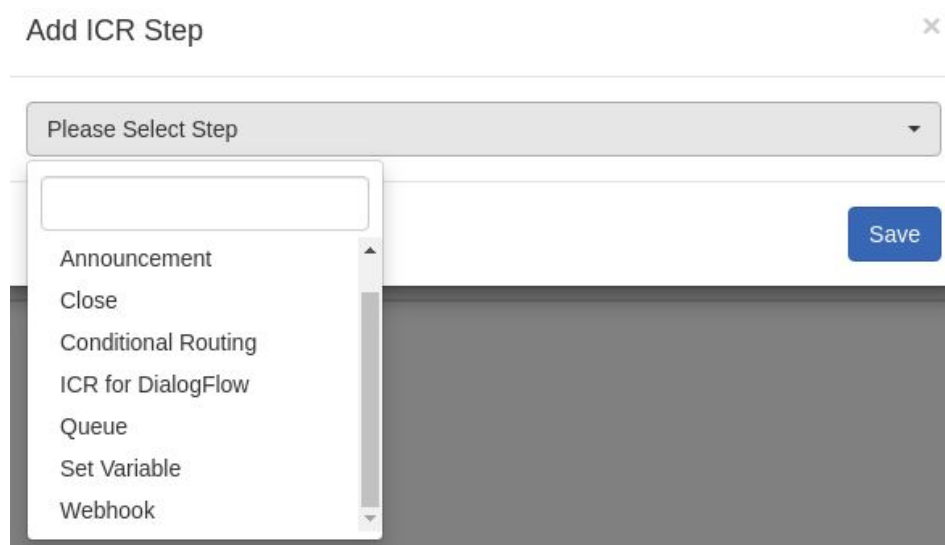
Out of working hours, steps can be used within an ICR to notify the customer that they cannot be transferred to a live agent because it is not within working hours. This step can be used instead of creating time constraints within the Incoming Chat section.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a large text input field with the placeholder text "Please Select Step". At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" pop-up window, but with the dropdown menu open. The menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button is still visible at the bottom right.

3. Select the “Out of Working Hours” step from the dropdown list; an example selection is shown below:

Add ICR Step
×

Out Of Working Hours


Save

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

Out Of Working Hours Step Settings


Step Name	Step Name
Description	Description
Note Input Time (sec)	Note Input Time (sec)
Time Out Next Step	Please Select Timed Out Step
Next Step	Please Select Next Step
Announcement	Announcement
Success Announcement	Success Announcement
Unsuccessful Announcement	Unsuccessful Announcement

Note: The entire selection is not shown. The scroll bar needs to be used to view all the inputs.

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. Click the “Note Input Time (sec.)” input box, type the desired note timeout.
 8. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: Previous steps can also be used to show the customer the variable selection again on ICR)
 9. Click the “Announcement” input box, type the desired announcement.
 10. Click the “Successful Announcement” input box, type the desired announcement.
 11. Click the “Unsuccessful Announcement” input box, type the desired announcement.
 12. Click the “Information Email Address” input box, type the desired email address.
 13. Click the “Tag” dropdown box, select the desired tags.
 14. Click the “Save” button, .

Adding Set Variable Step

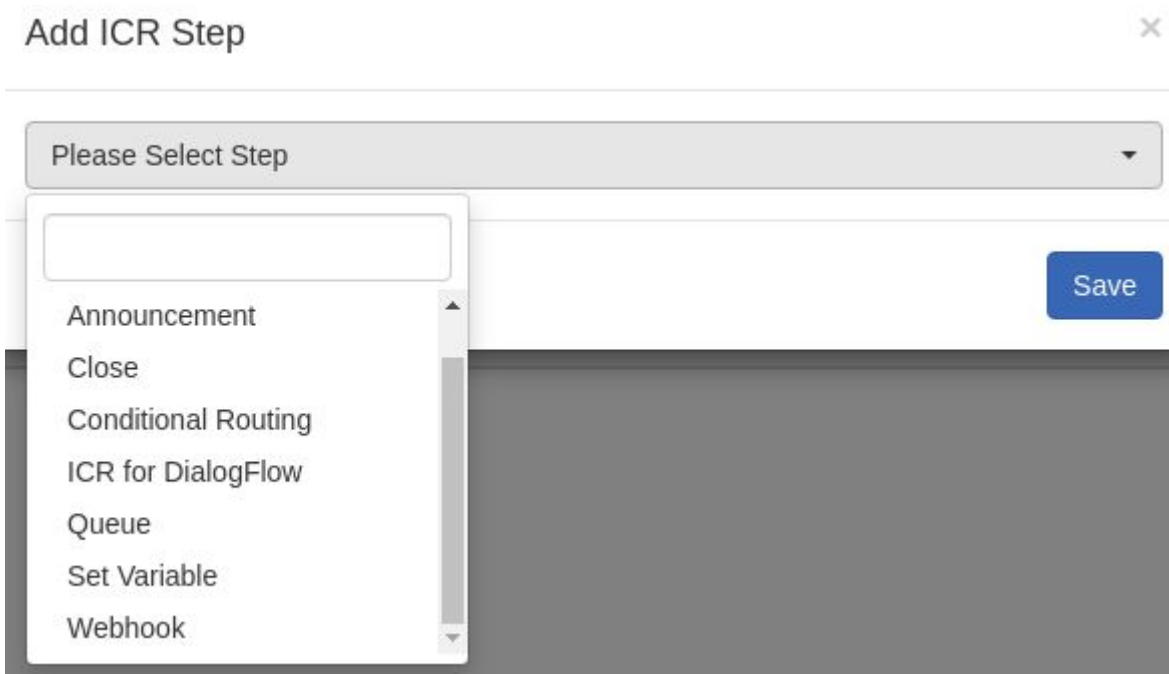
The set variable step is used to create variables for conditional routing.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A dialog box titled "Add ICR Step" with a close button (X) in the top right corner. It contains a dropdown menu with the text "Please Select Step" and a blue "Save" button at the bottom right.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



The same "Add ICR Step" dialog box is shown, but the dropdown menu is open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Set Variable" option is highlighted. The "Save" button remains at the bottom right.

3. Select the “Set Variable” step from the dropdown list; an example selection is shown below:

Add ICR Step
×

Set Variable

Save

4. Click the “Save” button,

Save


, the following will appear on the right-hand side of the screen:

Set Variable Step Settings

Step Name	<input style="width: 90%;" type="text" value="Step Name"/>
Description	<input style="width: 90%;" type="text" value="Description"/>
Set Variable Name	<input style="width: 90%;" type="text" value="Set Variable Name"/>
Set Variable Value	<input style="width: 90%;" type="text" value="Set Variable Value"/>
Set Variable Input Time (sec)	<input style="width: 90%;" type="text" value="Variable Input Time (sec)"/>
Time Out Next Step	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Please Select Timed Out Step ▼ </div>
Next Step	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Please Select Next Step ▼ </div>
Announcement	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Announcement </div>
Template Messages	<div style="background-color: #007bff; color: white; padding: 5px; text-align: center; border-radius: 4px;">+</div>

Save

Cancel


5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. Click the “Set Variable Name” input box, type the desired variable name.
8. Click the “Set Variable Input Time (Sec)” (Used as time out period for variable inputs on conditional routing step), type the desired length of time for the timeout (sec).
9. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: The previous step can also be used to show the customer the variable selection again on ICR)
10. Click the “Announcement” input box, type the desired announcement (Normally the variable list used in the conditional routing step).
11. Template messages can be added by clicking the “Plus” button  , the following screen will be displayed:

Message To Show




Message To Send

Save

12. When finished, click the “Save” button,  .

Adding Webhook Step

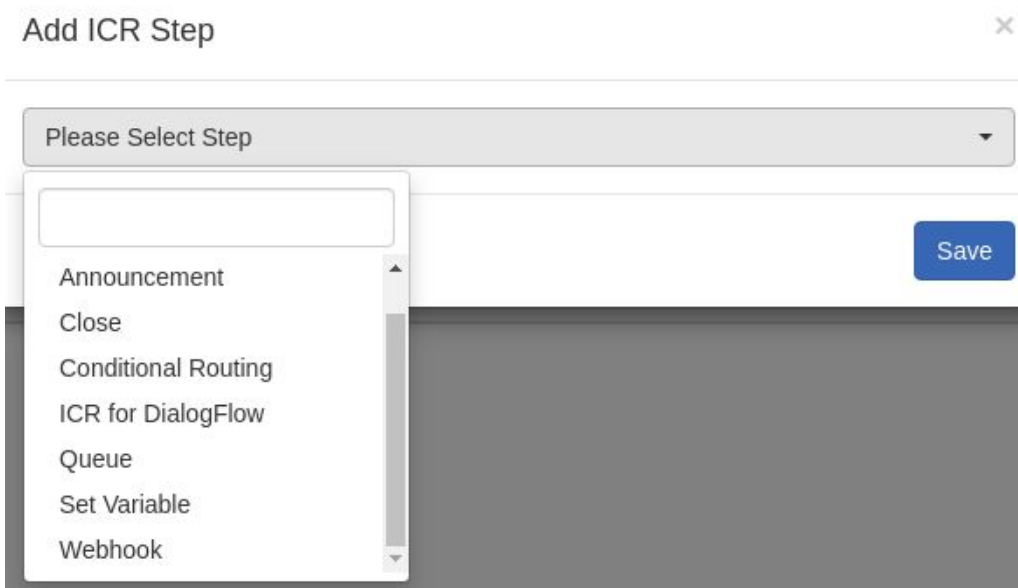
The webhook step is used for sending information to, or for receiving information from a web service.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up dialog titled "Add ICR Step" with a close button (X) in the top right corner. It contains a dropdown menu with the text "Please Select Step" and a blue "Save" button at the bottom right.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The same "Add ICR Step" pop-up dialog, but with the dropdown menu open. The menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

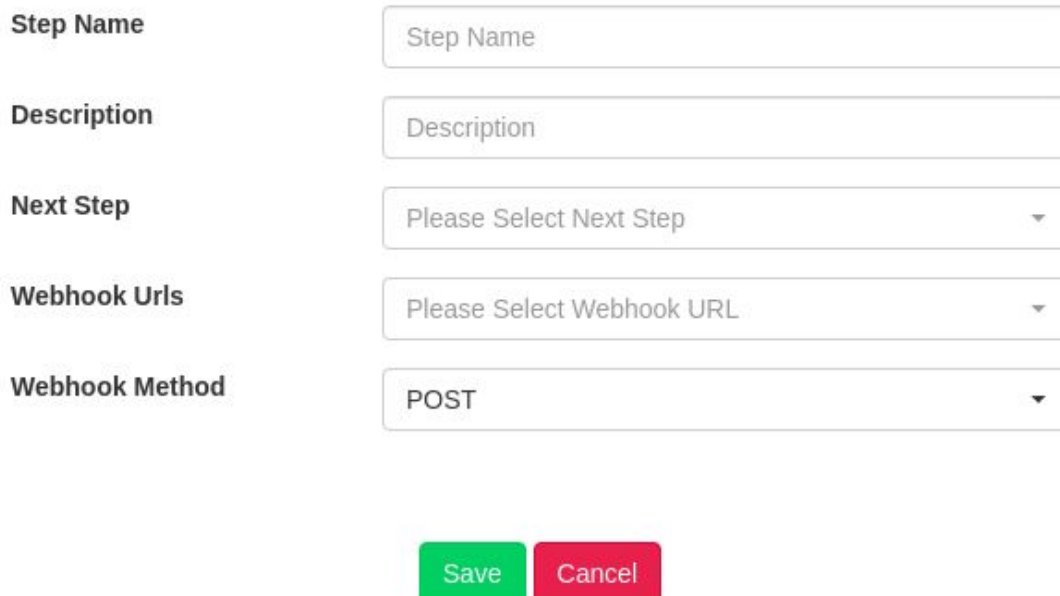
3. Select the “Webhook” step from the dropdown list; an example selection is shown below:



The image shows a dialog box titled "Add ICR Step" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu with "Webhook" selected. At the bottom right of the dialog is a blue "Save" button.

4. Click the Save button, , the following will appear on the right-hand side of the screen:

Webhook Step Settings




The image shows a form titled "Webhook Step Settings". It contains five rows of input fields:


- Step Name**: A text input field with the placeholder "Step Name".
- Description**: A text input field with the placeholder "Description".
- Next Step**: A dropdown menu with the placeholder "Please Select Next Step".
- Webhook Urls**: A dropdown menu with the placeholder "Please Select Webhook URL".
- Webhook Method**: A dropdown menu with "POST" selected.

At the bottom of the form are two buttons: a green "Save" button and a red "Cancel" button.

5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.

-
7. Click the “Webhook Urls” dropdown menu, select the desired Webhook URL (Note: Webhook URLs are created in the Web URLs section, See Web URLs for creating a Web URL or talk to the assigned Call Center Studio Project Manager.)
 8. Select the desired “Webhook Method” from the dropdown box.
 9. When finished, click the “Save” button,  .

Editing ICR Step



1. Click the edit button, , located to the right of the “Next Step” a pop-up window will be displayed according to the step type, an example edit for the root step is shown below:

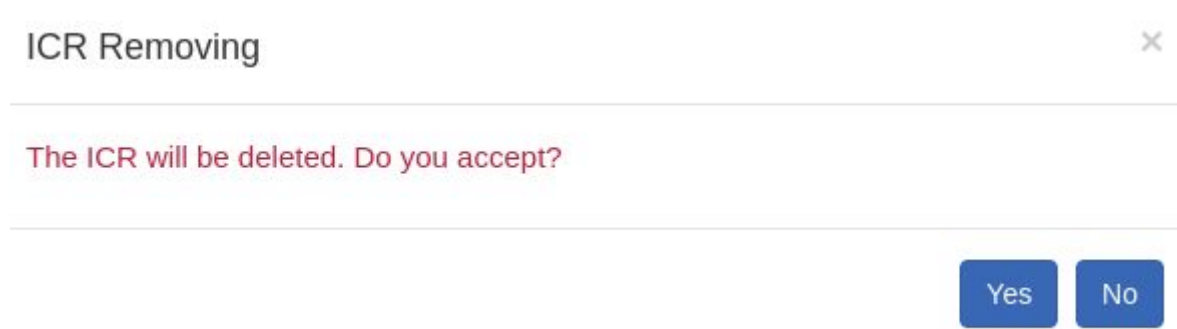
Root Step Settings




Step Name	<input type="text" value="ICR_Root"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div><div>Announcement</div></div>
Chat evaluation	<input type="checkbox"/>

2. Make desired changes (See Adding steps for more information)
3. Click the Save button, .

Deleting ICR Step

1. From the ICR name list, click the remove button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Selecting the “No” button, , will cancel the deletion.
 - Selecting the “Yes” button, , will confirm the deletion.
2. Confirm the deletion by clicking the “Yes” button, .

The screen will reload, and the deleted ICR step will not be shown.

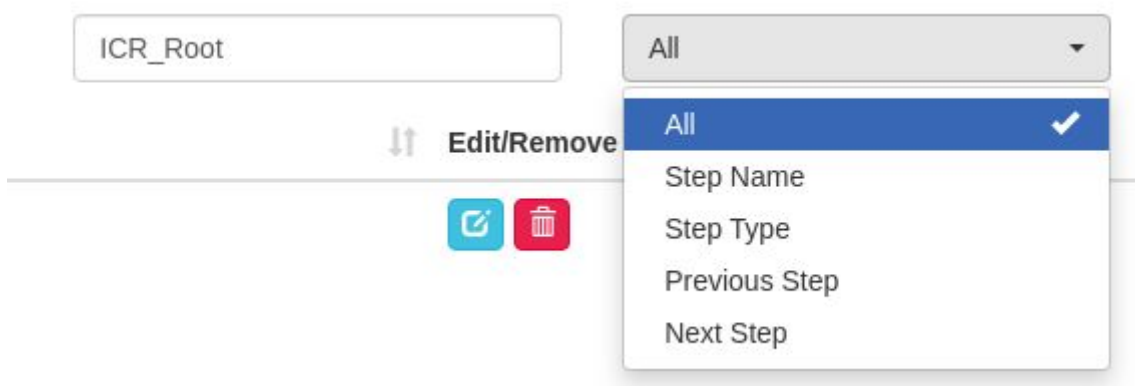
Searching for an ICR Step

There are five ways to search for an ICR step. ICR steps can be searched using the separate filter options or a combination of filter options explained below:

1. Click the search box in the top right-hand corner, type the desired ICR step as shown below:




2. For ease of use ICR steps can be filtered by clicking the dropdown box list as shown below:





3. Filter using the appropriate dropdown selection, to find the desired ICR step.

Editing ICR



1. Click the edit button, , located to the right of the “Create Date” column, after clicking the following pop-up window will be displayed:

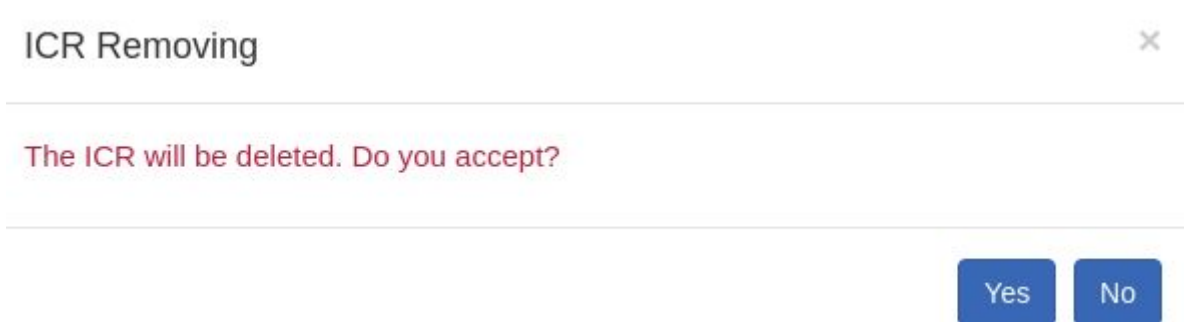
ICR		
STEPS		
Step Name	Step Type	Previous Step
ICR_Root	root	




2. Make changes as desired
3. Click the “Save ICR” button, , located in the top right-hand corner
4. To return to the main menu, click the “Show ICR List” button, , the ICR List screen will appear as shown below:

ICR List		
ICR Name	Step Count	Create Date
ICR	1	2020-04-29 19:58:29

Deleting ICR

1. From the ICR name list, click the remove button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- Selecting the “No” button, , will cancel the deletion.
 - Selecting the “Yes” button, , will confirm the deletion.
2. Confirm the deletion by clicking the “Yes” button, .

The screen will reload, and the deleted ICR will not be shown.

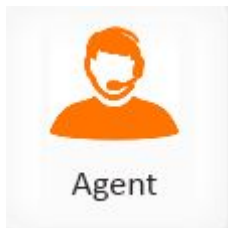
Searching for an ICR

1. Click the “Search” input box, type the ICR name as shown below:

Search:

Note: Partial names can be used, when spelled correctly.

Agent Screen



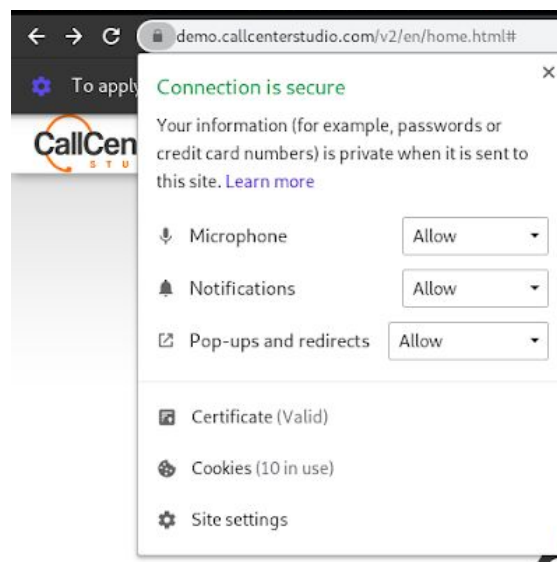
The agent screen is used by the customer service representative to perform inbound and outbound communication with customers.

Audio Settings


This section contains information to help agents in troubleshooting errors regarding the sound settings in Call Center Studio.

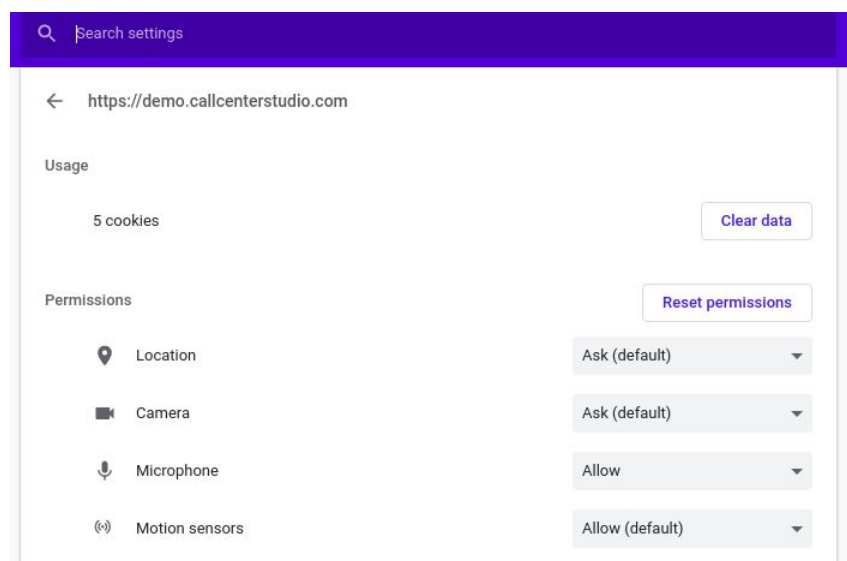
URL Settings


1. Click the security button to the left of the URL when clicked the following settings will be displayed:



Note: Microphone, Notifications, and Pop-ups and redirects have all been changed to “Allow” for the agent tenant screen.

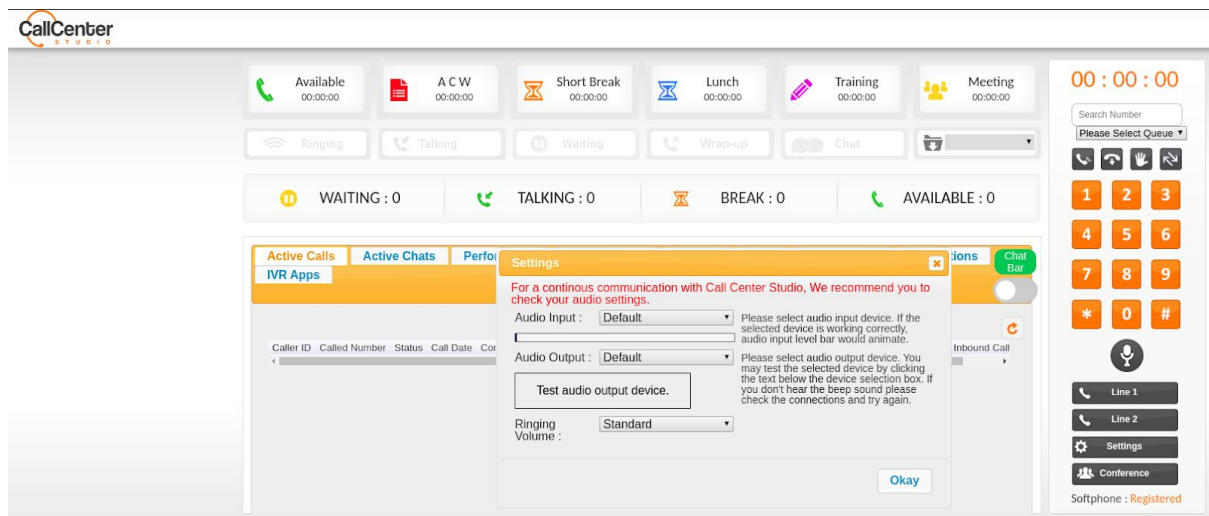
2. If these settings are not initially shown, click site settings,  Site settings, once pressed the page settings screen will appear as shown below:



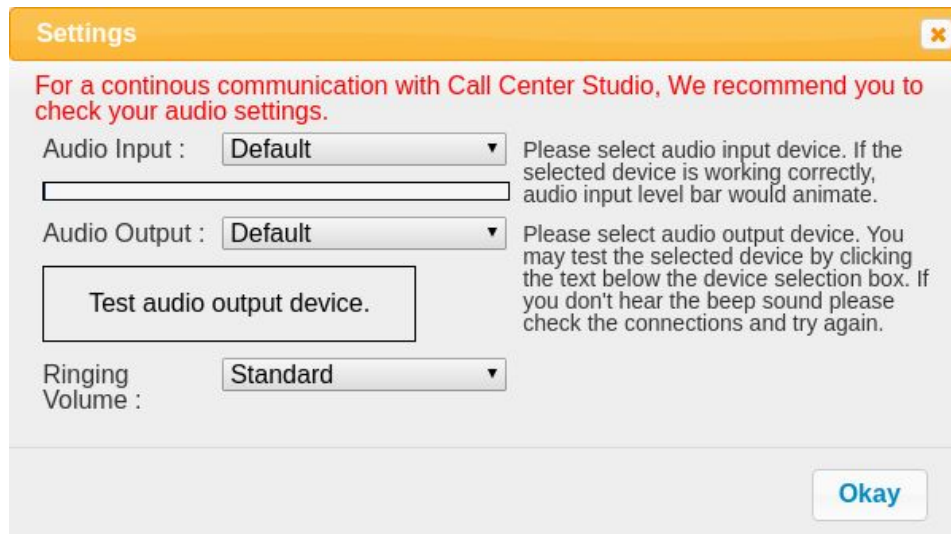
3. Look through the settings list and select "Allow" for the microphone, notification, and Pop-ups and redirects.
4. Click the exit button, , to the right of the settings tab, and return to the Agent Screen.

Agent Screen Audio Settings

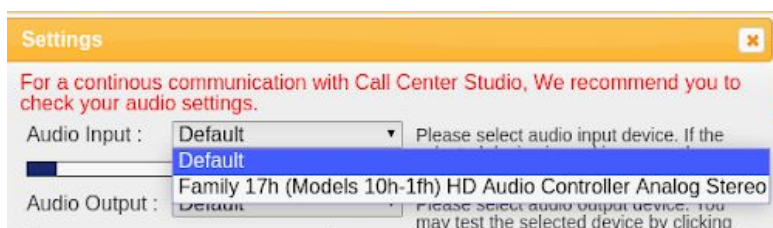
1. Once in the agent module, the following screen will appear:



2. Every time the agent logs into the Agent Screen, the tenant sound setting pop-up window will appear as shown below:

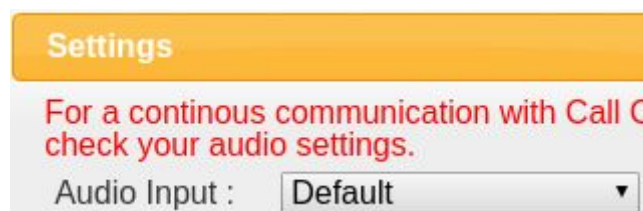


3. Click the “Audio input” dropdown box a dropdown menu will appear:



Note: In the dropdown menu, the agent should select the desired audio input method.

5. Select the desired audio input. An example is shown below:

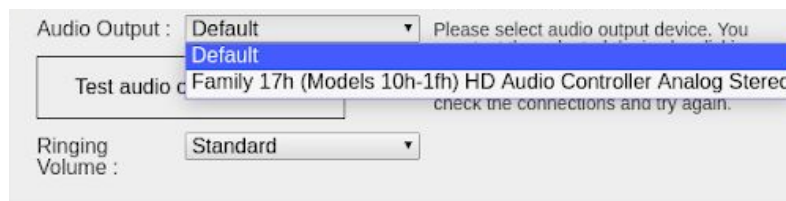


6. After selecting the desired audio input method, use the vertical soundbar shown below to determine if the audio input device is working correctly:



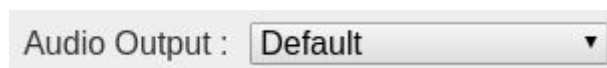
Note: The audio input level bar will illuminate in dark blue when speaking, to test the proper audio input connection.

7. Click the “Audio Output” dropdown box a dropdown menu will appear an example is shown below:

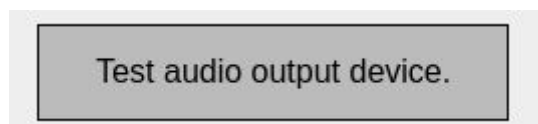


Note: In the dropdown menu, the agent should select the desired audio output method.

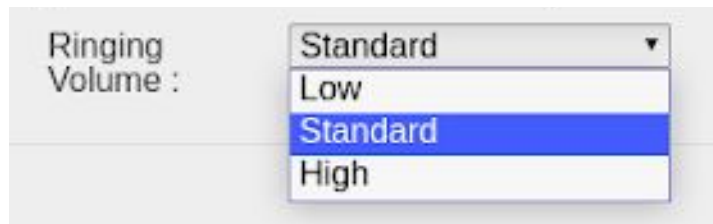
8. Select the desired audio output; an example is shown below:



9. After selecting the desired audio output method, click the "Test audio output device." button if working correctly, a beep will be heard in the agent's selected audio output device, the switch is shown below:

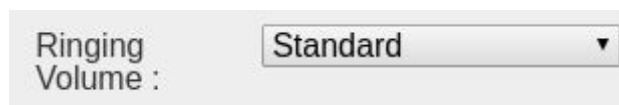


10. Click the Ringing Volume input box a dropdown menu will appear as shown below:



Note: Ringing volume is based on the agent's preference, three volumes can be selected: Low, Standard, and High.

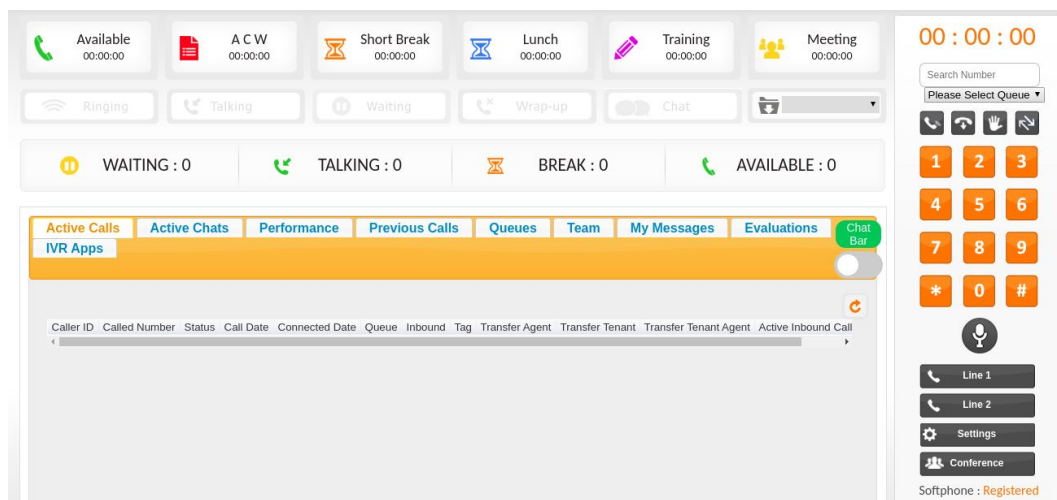
11. Select the desired ringing volume; an example selection is shown below:



12. Once all audio settings have been selected and tested, click the "Okay" button,



. The agent screen will be displayed, as shown below:



Agent Statuses





Agent statuses are used to track agent productivity. Supervisors can view the statuses of agents in real-time. The default and custom statuses are explained in detail below.



Default Statuses

At the top of the agent screen, the six Call Center Studio default agent statuses are listed, an image of these statuses is shown below:



Each status is used differently, as described below:

 Available 00:00:00	Tracks agents' time in available status. For agents to make and receive calls, the available status must be selected.
 A C W 00:00:00	Tracks agents' time in After Call Writeups.
 Short Break 00:00:00	Tracks agents' time on breaks.
 Lunch 00:00:00	Tracks agents' time at lunch.

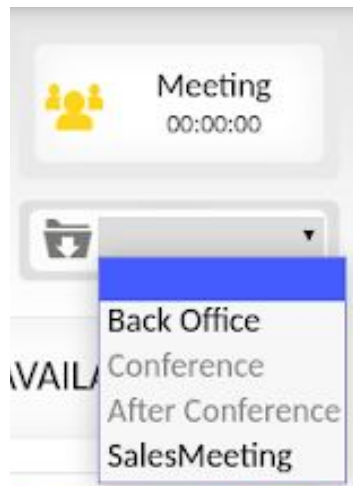
 <p>Training 00:00:00</p>	Tracks agents' time in training.
 <p>Meeting 00:00:00</p>	Tracks agent's time in meetings.

Note: Agents have to click the status that defines their current situation for proper tracking to occur. Supervisors can change the status of an agent when necessary. (See supervisor section)

Custom Statuses

Custom statuses can be created and defined by the administrator. The following information demonstrates how an agent can select a custom status.

1. Below the meeting tab is a dropdown menu with a folder containing a downward-facing arrow, click this dropdown box below:



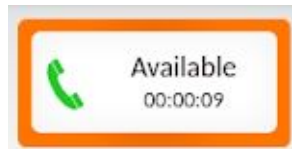
Note: Back office, Conference, and After Conference are built-in statuses and can be made active by administrators (See Statuses Section).

2. SalesMeeting status was created to provide an example of what a custom status looks like; the agent simply needs to click the status (note the agent will not be able to view the time in custom status, but the time can be viewed under the supervisor tab).

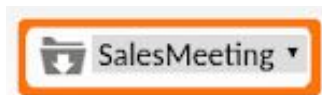
Selecting a Status

To select a Status, click the desired status from the default menu, select a custom status (See Custom Status section for more info). The chosen status will be outlined in orange; examples are shown below:

Active Default Status Example:



Active Custom Status Example:



Changing a Status

To change status, click a different status.





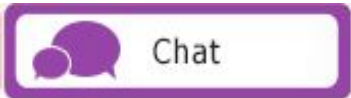
Call Statuses

Call Statuses are used so that the agent can know the status of the call, such as ringing, talking, waiting, wrap-up, and chat.

The call statuses are not illuminated until a call is made, the unilluminated statuses are shown below:



The five call statuses when illuminated are defined below:





	Will light-up as shown when an incoming call or outgoing call is in progress.
	Will light up as shown when an incoming or outgoing call is answered.
	Will light up when a call has been placed on hold by the agent.
	Pause, used after chatting and calling (through campaigns) for the agent to wrap-up any tasks with the customer. The agent can then reselect "Available" status to continue answering customers. (Wrap-up time can be changed in the Administrator section under Queues).
	Will light up when the agent is chatting with a customer.

Call Center at a Glance

Metrics regarding the queue and team performance are available to the agent. The “Call Center at a Glance” is a valuable resource for agents to use for time management and decision making. The “Call Center At a Glance” bar is displayed below:



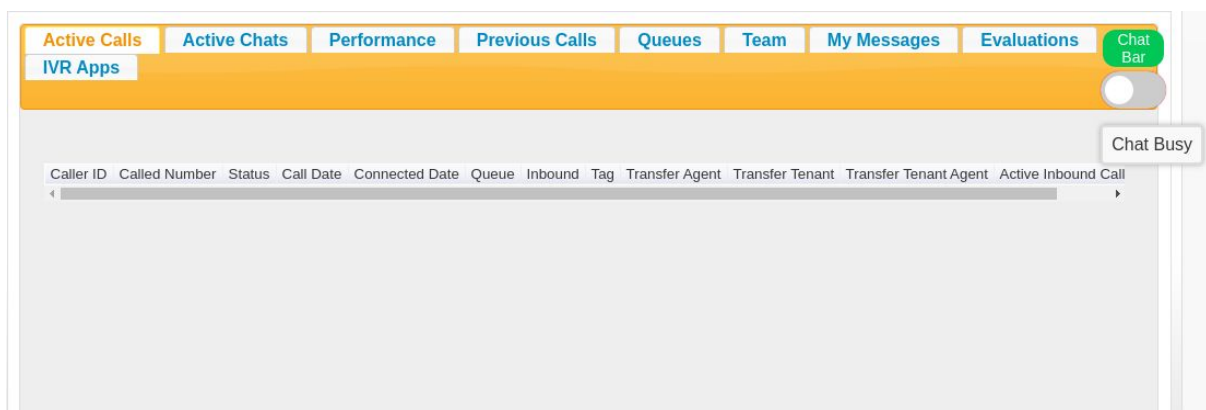
The “Contact Center At a Glance” metrics are defined below:

 WAITING : 0	Displays the number of consumers waiting in the queue assigned to the agent
 TALKING : 0	Displays the number of agents talking to consumers in the queue assigned to the agent
 BREAK : 0	Displays the number of agents on break in the queue assigned to the agent
 AVAILABLE : 0	Displays the number of agents available in the queue assigned to the agent

Agent Panel

The agent panel allows agents the ability to monitor their active calls, active chats, and performance. Also, the agent can view previous call history from this panel. Also, agents can monitor queue metrics such as total calls, answered calls, short calls, abandon calls, answer speed, and total talking time. Agents can view team status and times in status, and they can send messages to the supervisor, team, or a specific team member. Lastly, agents can see evaluations and use IVR applications all within the control panel.

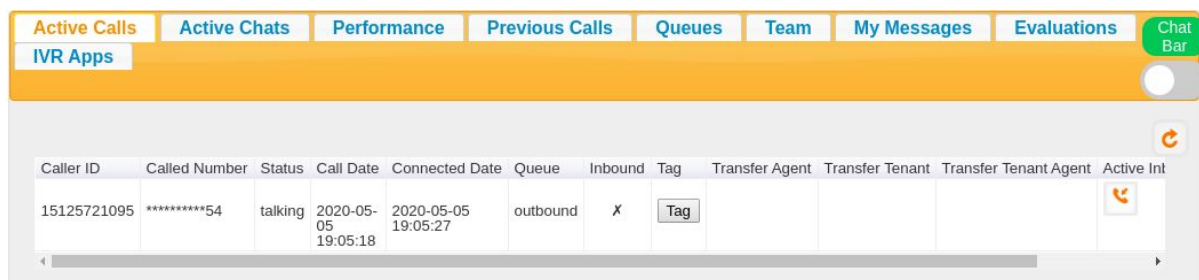
An example of the agent screen is shown below:




Active Calls

The agent panel's active calls tab provides information about the agent's current call, such as the queue, the consumer name, the status of the call, the duration of the call, and the phone number. Agents can also tag a call if desired when the call is in progress from this screen.

An example of the active calls tab with an active call is shown below:



Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****54	talking	2020-05-05 19:05:18	2020-05-05 19:05:27	outbound	X	<button>Tag</button>				

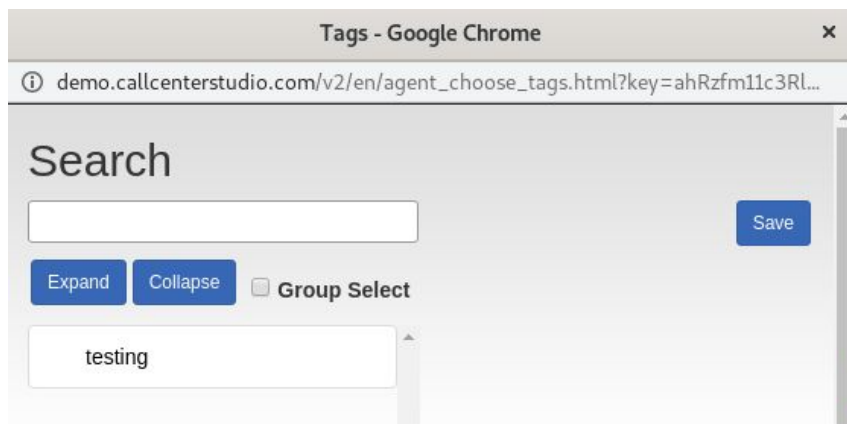
Tagging an Active Call

Calls can be tagged while the agent is talking to the consumer.

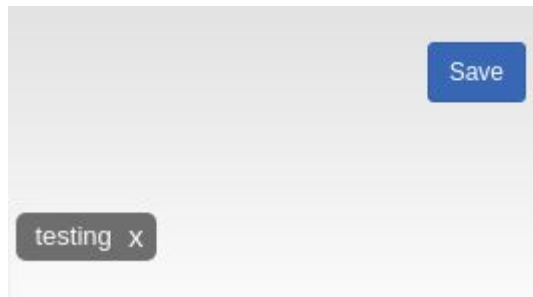
Note: If a call is tagged while the call is in progress, more tags cannot be added by the agent after the call is finished.

1. While the call is in progress a tag can be assigned to the call by clicking the tag


button, , once click the following pop-up window will be displayed:



-
2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag(s) from the tag list (Group tag selections can be made by checking the “Group Select” checkbox. Once a tag has been selected, it will be displayed as shown below:



Note: Tags can be deselected from the call by clicking the X to the right of the tag name.

3. Once all the desired tag selections have been made, click the save button, .

Note: More tags can be added while on the call if necessary by repeating steps 1 - 3.

Active Chat

Active Chat shows all of the agent's active chats. Details such as queue, client name, status, duration, tag, and phone number can be viewed in the active chat tab.

The following image is an example of the agent active chat window with a live chat:



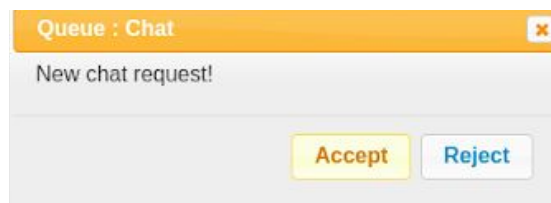
Answering a Chat


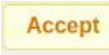
On the agent screen, the following will occur when an incoming chat appears:

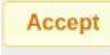
The ringing call status will illuminate:



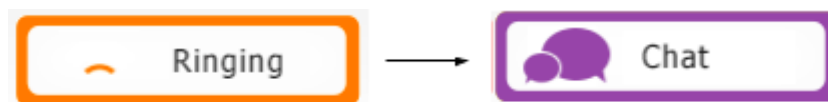
The following pop-up will appear:



- Select the cancel button, , to reject the chat.
- Select the accept button, , to accept the chat

1. Click the accept button, , the following transitions will occur:

The ringing status will change to chat status:



The chat window will appear:

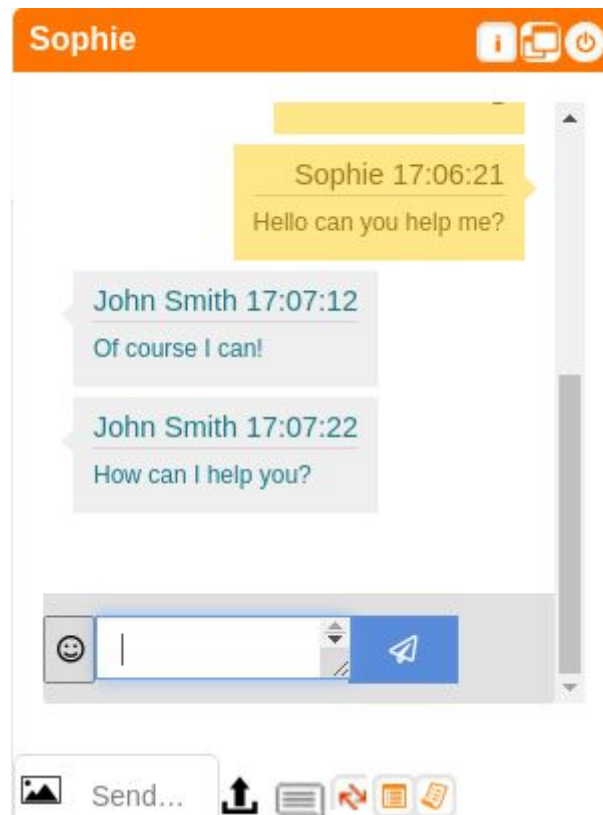


The active chat tab will show the current chat:

Active Calls	Active Chats	Performance	Previous Calls	Queues	Team	My Messages	Evaluations	Chat Bar
IVR Apps								1
Queue ▲	Client Name	Status	Duration	Tag	Phone Number			
Chat	Matt Christina	chatting	00:00:05	Tag				



Chatting

Using the chat pop-up window shown below:



The following functions can be completed:

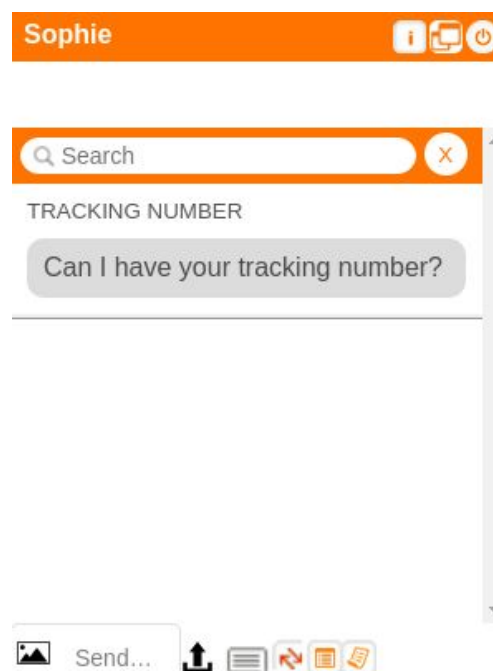
Sending a Chat Message

1. Click the message input box, , type the desired message.
2. Click the send button, .

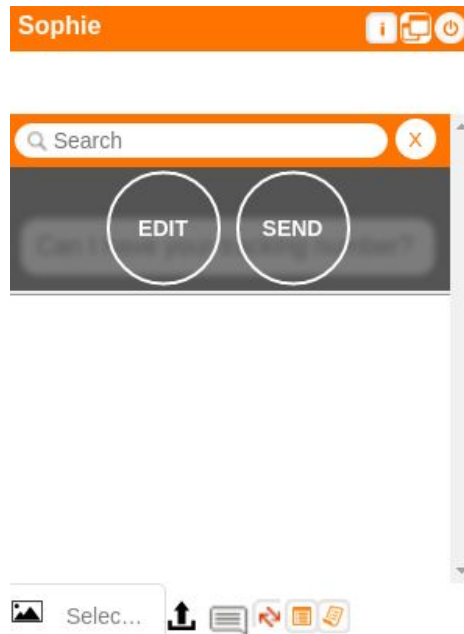
Sending a Template Message


Template messages are used by agents to increase response time and efficiency. See *Chat Widgets Section, Template messages* for information on creating a template message.



1. Click the open template messages button, , the following screen will appear in the chat window:



- Click the desired template message. The following will appear:




Note: If multiple template messages are present, the search input box,  can be clicked, type the desired subject of the template message to filter the results.

- The Template message can be sent directly by clicking the send button, , or the message can be edited by clicking the edit button, . Once the edit button is clicked the template message will appear in the message input box as shown below:




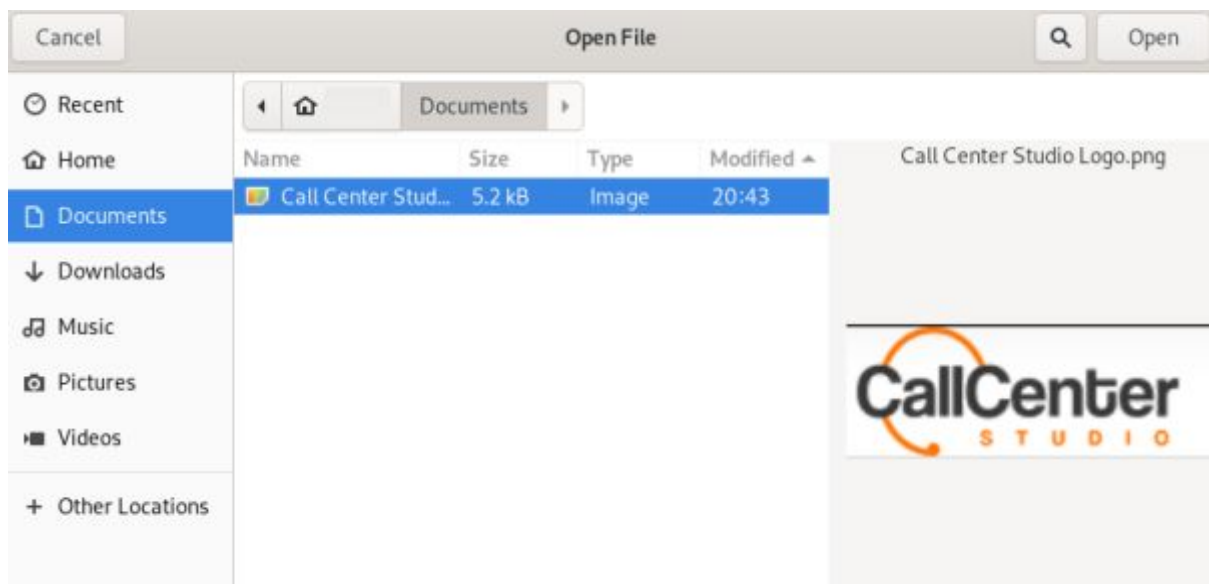
4. Edit the Template message as desired.

5. Click the send button, .

Sending a File


Note: Sending a file feature can not be used when “Restricted File Sharing” is checked for the chat widget. The following image shows how the agent chat screen changes when this checkbox is selected:

1. Click the send file window,  Send..., the following popup will appear:



2. Click the desired file. The file will appear in the send file window, as shown below:



3. Click the send file button, , the file will appear in the chat window, as shown below:




Parking a Chat


Parking allows the customer to be placed on hold. Agents can answer other chats when the customer responds the same agent will receive the chat.

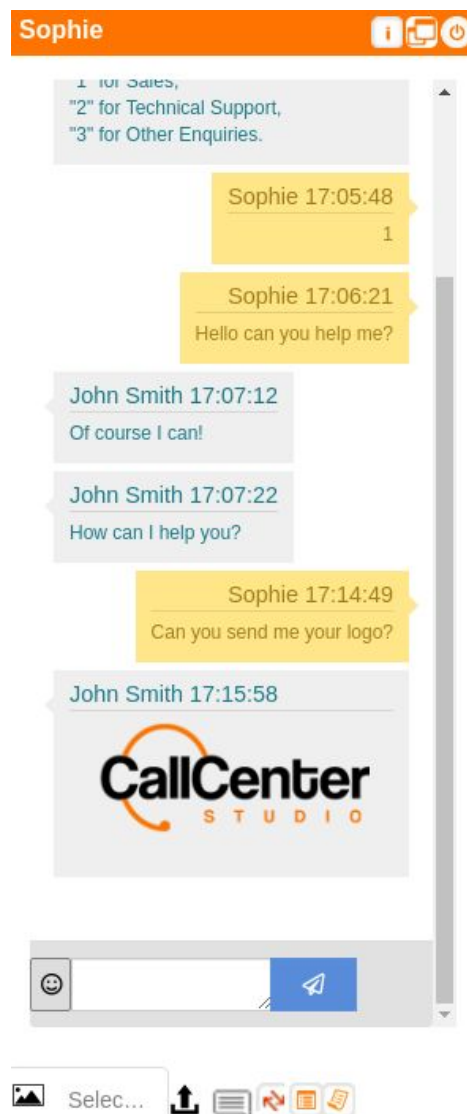
1. Click the park button, , the following pop-up window will appear:




2. Click the yes button, .

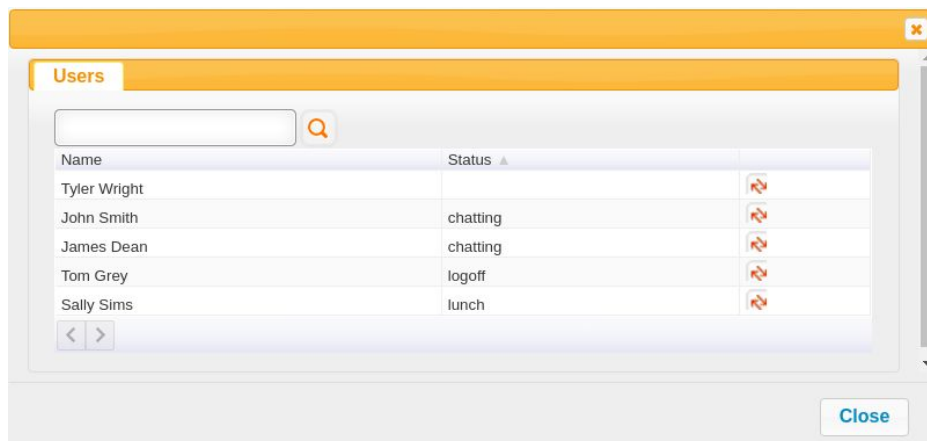
Expanding the Chat Window


1. Click the change size button, , the chat window will enlarge an example is shown below:



Transferring a Chat

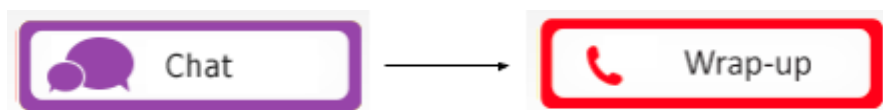
1. Click the transfer button, , the following pop-up will be displayed:



2. In the search input box, type the user's name if the agent is available, select the transfer button, , to the right of the status column. The following transition will take place:

The chat window will disappear.


The chat status will change to wrap-up status:



The available button will illuminate:



Pulling Data from a CRM Using a Web Service for a Chat


1. Click the custom field button, , the following pop-up screen will appear:

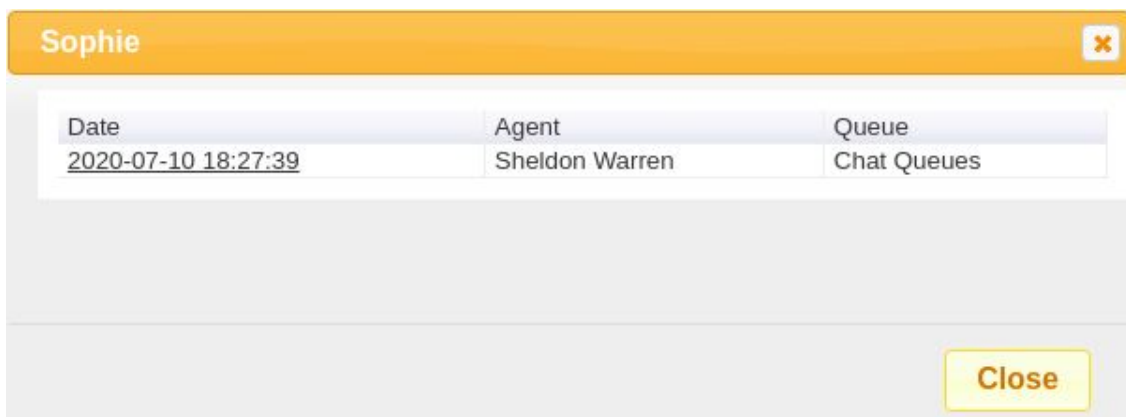


Note: Currently, the custom field example is not pulling information from the web service because the screen is blank. When using a web service, data about the customer from the

CRM can be viewed here. (If desired, this feature can be completed, talk to the assigned Call Center Studio Project manager.)

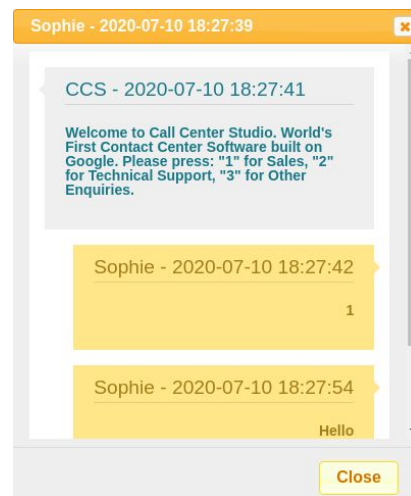
Viewing Customer Previous Chat History on a Chat

1. Click the view history button, , the following pop-up screen will appear:




Note: Previous customer chat history can be viewed if the customer inputs the same email address. The tenant uses the email to keep track of the chat records.

-
- Click the desired underlined date located in the date column. The following pop-up screen will be displayed:




- After viewing, click the “Close” button,



- Then click the other “Close” button,  , to exit the previous chat history window.

Finishing a Chat

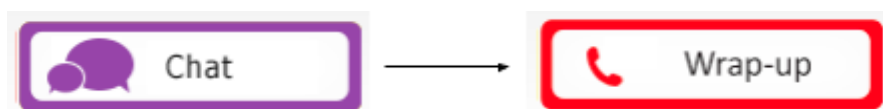
1. Click the finish chat button, , the following pop-up screen will appear:



2. Click the yes button, . The following transitions will occur:

The chat window will disappear.

The chat status will change to wrap-up status:



The available button will illuminate:



The performance tab monitors an agent’s daily self-performance.

Active Calls

Active Chats

Performance

Previous Calls

Queues

Team

My Messages

Evaluations

Chat Bar

IVR Apps

Total Calls	Total Talk Time	Total Avg Talk Time	Total Local Release	Inbound Calls	Inbound Talk Time	Inbound Avg Talk Time	Inbound Local Release	Answer Sp
8	00:06:34	00:01:18	6	0	00:00:00	00:00:00	0	0


Total Holds	Total Duration	Available	Break	Lunch	Break + Lunch	Meeting	Training	ACW	Back Office	Talking	Ringing	Wrap-up	Dialing	Cl
2	01:28:22	00:53:54	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:01:11	00:05:17	00:00:00	00:00:00	00:03:21	00

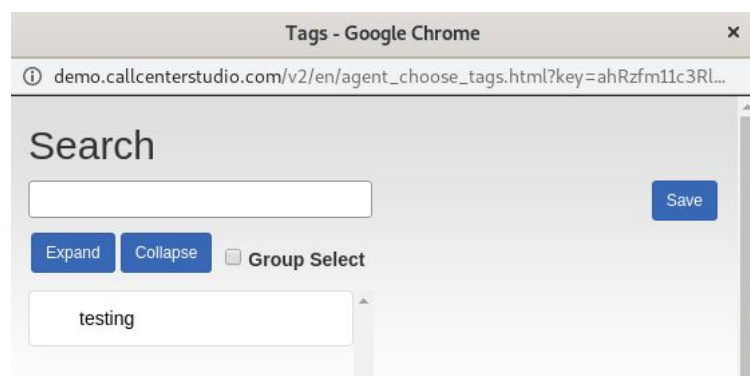
The previous call tab lists the last 19 calls that the agent has made or received. Quick metrics on these calls can also be viewed under the performance tab and the ability to tag previous calls. An image of a “Previous Call” tab is displayed below:

Active Calls	Active Chats	Performance	Previous Calls	Queues	Team	My Messages	Evaluations	Chat Bar
IVR Apps								
Caller	Called	Queue	Call Date ▾	Start Date	Finish Date	Duration	Tag	
 15125721095	 *****54	outbound	2020-05-05 19:05:18	2020-05-05 19:05:27	2020-05-05 19:09:24	00:03:57		
 15125721095	 *****54	outbound	2020-05-05 18:49:19	2020-05-05 18:49:26	2020-05-05 18:49:58	00:00:32	<button>Tag</button>	
 15125721095	 *****54	outbound	2020-05-05 18:33:04	2020-05-05 18:33:12	2020-05-05 18:33:18	00:00:06	<button>Tag</button>	
 15125721095	 *****54	outbound	2020-05-05 18:32:22		2020-05-05 18:32:57	00:00:00	<button>Tag</button>	
 15125721095	 *****54	outbound	2020-05-05 18:30:27	2020-05-05 18:30:52	2020-05-05 18:32:11	00:01:19	<button>Tag</button>	
 15125721095	 *****20	outbound	2020-05-05 16:34:47		2020-05-05 16:35:44	00:00:00	<button>Tag</button>	
 15125721095	 *****77	outbound	2020-05-05 16:32:39	2020-05-05 16:33:08	2020-05-05 16:33:48	00:00:40	<button>Tag</button>	
 15125721095	 *****20	outbound	2020-05-05 16:17:56		2020-05-05 16:18:17	00:00:00	<button>Tag</button>	
 15125721095	 *****63	outbound	2020-05-04 17:10:38	2020-05-04 17:10:49	2020-05-04 17:15:08	00:04:19	<button>Tag</button>	

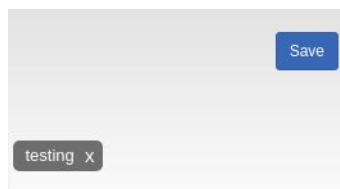
Tagging a Previous Call

Note: If a call is tagged in the previous call screen,, more tags cannot be added after the save button is clicked.


1. Click the tag button, , located on the far right of the call metrics, once clicked, the following pop-up window will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by checking the “Group Select” checkbox. Once a tag has been selected, it will be displayed as shown below:



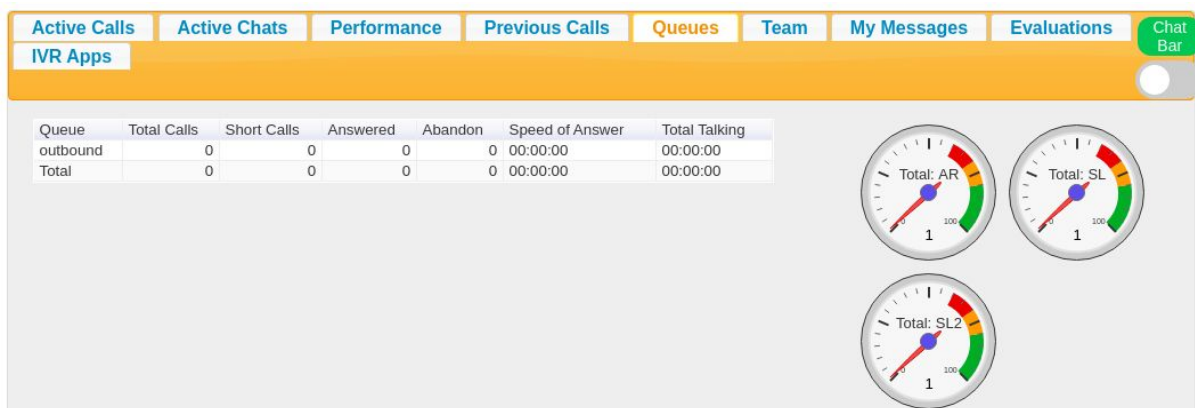
Note: Tags can be deselected from the call by clicking the X to the right of the tag name.

- Once all the desired tag selections have been made, click the save button, .

Queue

The Queue tab gives the agent brief performance metrics on how the assigned queue is performing. Metrics such as total calls, short calls, answered calls, abandoned calls, answering speed, and total talking time can be found under the Queue tab.

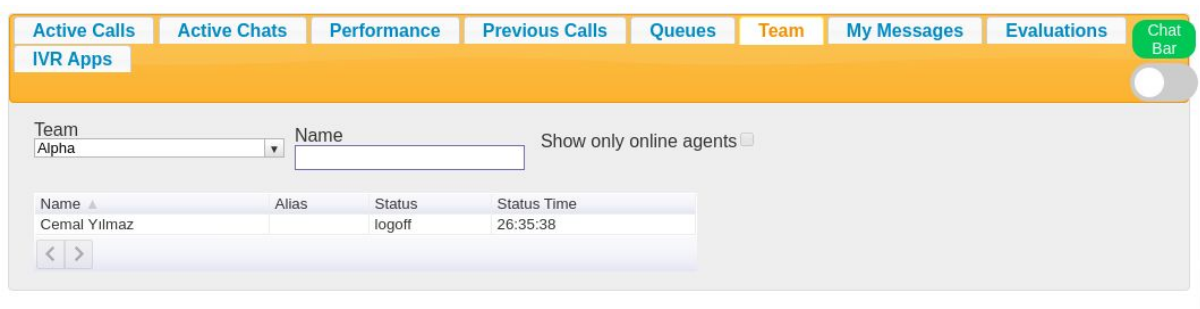
An example “Queue” tab is shown below:



Team

The administrator or supervisor can make and assign agents to teams. If the agent has been assigned a team, quick metrics on team members such as name, status, and status time can be viewed here.

An example of the team tab is shown below:



The screenshot shows the 'Team' tab selected in the top navigation bar. Below the navigation bar, there is a section for 'Team' with a dropdown menu set to 'Alpha' and a text input field for 'Name'. To the right of the 'Name' field is a checkbox labeled 'Show only online agents'. Below this is a table with the following data:

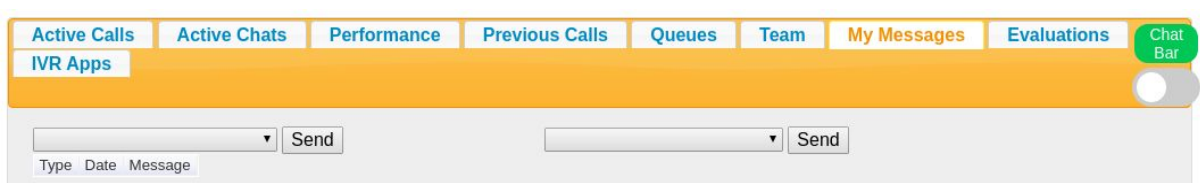
Name	Alias	Status	Status Time
Cemal Yilmaz		logoff	26:35:38

Navigation arrows are visible at the bottom left of the table.

My Messages

The My Messages tab is used by the agent to send messages to a supervisor and team members.

An example of the My Messages tab is shown below:

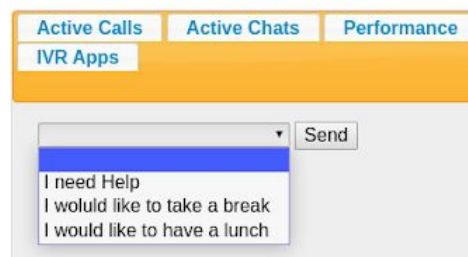


The screenshot shows the 'My Messages' tab selected in the top navigation bar. Below the navigation bar, there is a section for 'My Messages' with a dropdown menu and a 'Send' button. Below this is a table with the following data:

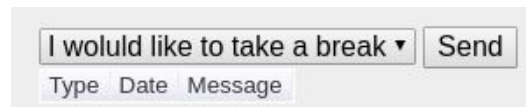
Type	Date	Message
------	------	---------


Sending a Default Message to a Supervisor

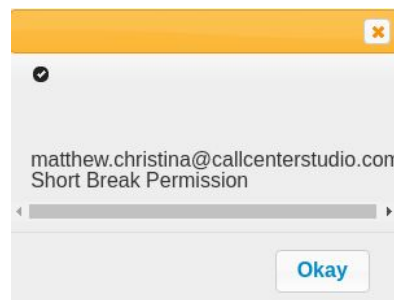
1. Click the first dropdown box (on the left) an example dropdown listing of default messages is shown below:



2. Click the desired message an example selection is shown below:



3. Click the send button, . The following notification pop-up window will be displayed on the supervisor screen:

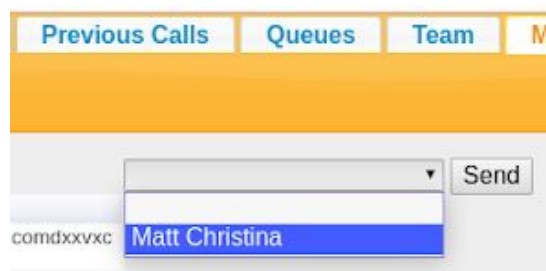


Note: Previously sent messages can be viewed by the agent, as shown below:

Type	Date	Message
Customer Representative	28/5/2020 17:23:41	sheldon.warren@callcenterstudio.comhello
	28/5/2020 17:23:41	hello

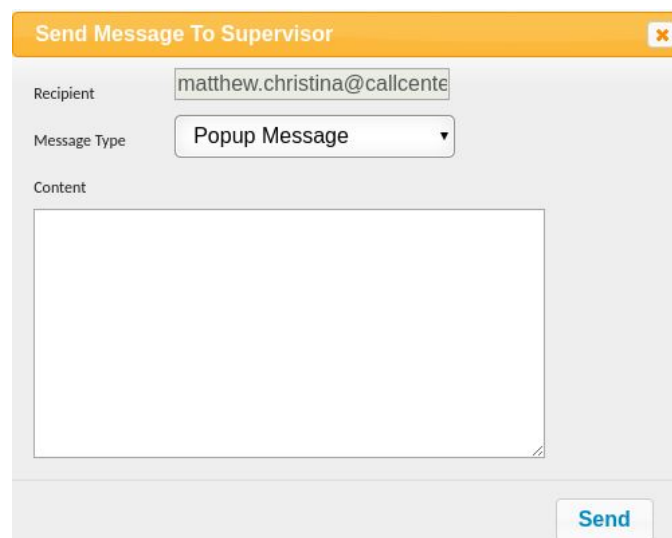
Sending a Custom Message to a Supervisor

1. Click the second dropdown box (on the right) the following dropdown menu will appear:



Note: If the agent is assigned a team, and there are multiple supervisors, all the supervisors' names will be listed in the dropdown menu.

2. Click the desired supervisor (if multiple) the following pop-up window will appear:

A screenshot of a pop-up window titled 'Send Message To Supervisor'. The window has a yellow header bar with a close button (X) in the top right corner. Inside the window, there are three fields: 'Recipient' with the value 'matthew.christina@callcente', 'Message Type' with a dropdown menu showing 'Popup Message', and 'Content' with a large text area. At the bottom right of the window is a 'Send' button.

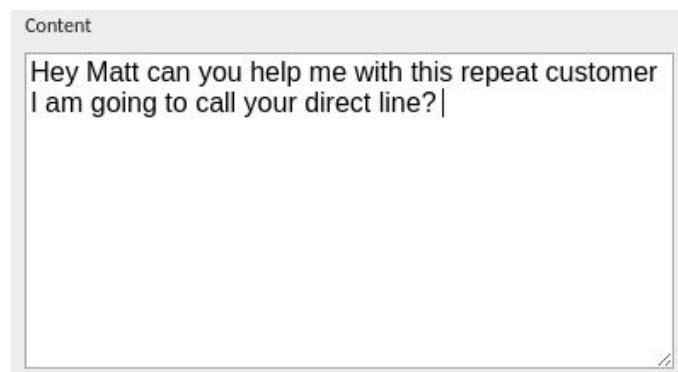
-
3. Click the message type input box the following dropdown menu will be shown:


A screenshot of a web form titled "Send Message To Supervisor" in an orange header. The form has three fields: "Recipient" with the value "matthew.christina@callcente", "Message Type" with a dropdown menu showing "Popup Message", and "Content" with a text input box. The dropdown menu is open, showing "Message" and "Popup Message" as options, with "Popup Message" highlighted in blue.

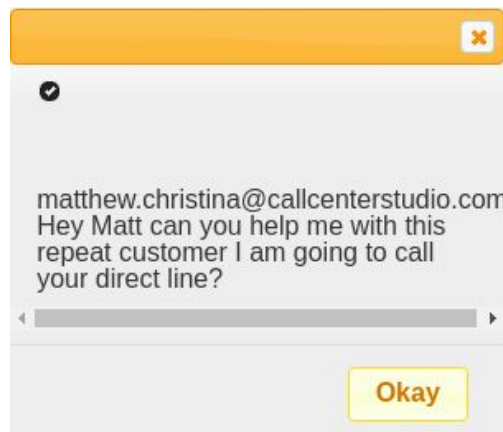
4. Select the desired message type. Note the default message type is Popup Message. An example selection is shown below:

A close-up of the "Message Type" dropdown menu. The label "Message Type" is on the left, and the dropdown box on the right shows "Popup Message" as the selected option with a downward arrow.

5. Click the content input box, and compose the message. An example message is displayed below:

A screenshot of the "Content" input box. The label "Content" is at the top left. The text area contains the message: "Hey Matt can you help me with this repeat customer I am going to call your direct line?". The text is in a black font on a white background.

6. Click the send button, . The following notification pop-up window will be displayed on the supervisor screen:




Note: Previously sent messages can be viewed by the agent as shown below:


Type	Date	Message
	5/5/2020 20:41:48	Hey Matt can you help me with this repeat customer I am going to call your direct line?

Evaluations


Supervisors can evaluate agent performance based on calls and chats. Agents can view evaluations under the evaluations tab. Details can be seen under this tab, such as Caller, date, duration of the call, evaluation score, and call recording. Agents can also view supervisor comments, messages, or make objections on the evaluated score.

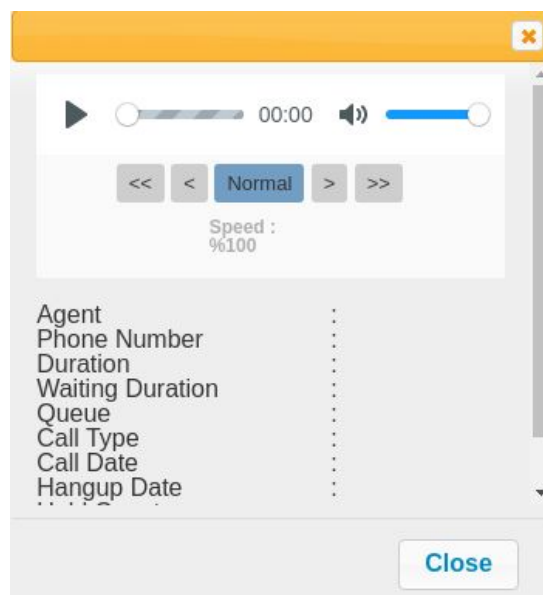
An example of the evaluation tab with an agent evaluation is shown below:



Caller	Called	Call Date	Hangup Date	Queue	Duration	Score	Evaluation Date	Evaluating User	Recording	Objection
15125721095	*****43	2020-05-05 20:23:50	2020-05-05 20:25:14	outbound	49	10	2020-05-06 16:32:51	matthew.christina@callcenterstudio.com		Object To

Listening to Call Recording from an Evaluation

1. Click the “Recording” button, , under the recording column on the evaluation. The following pop-up will be displayed:




2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:




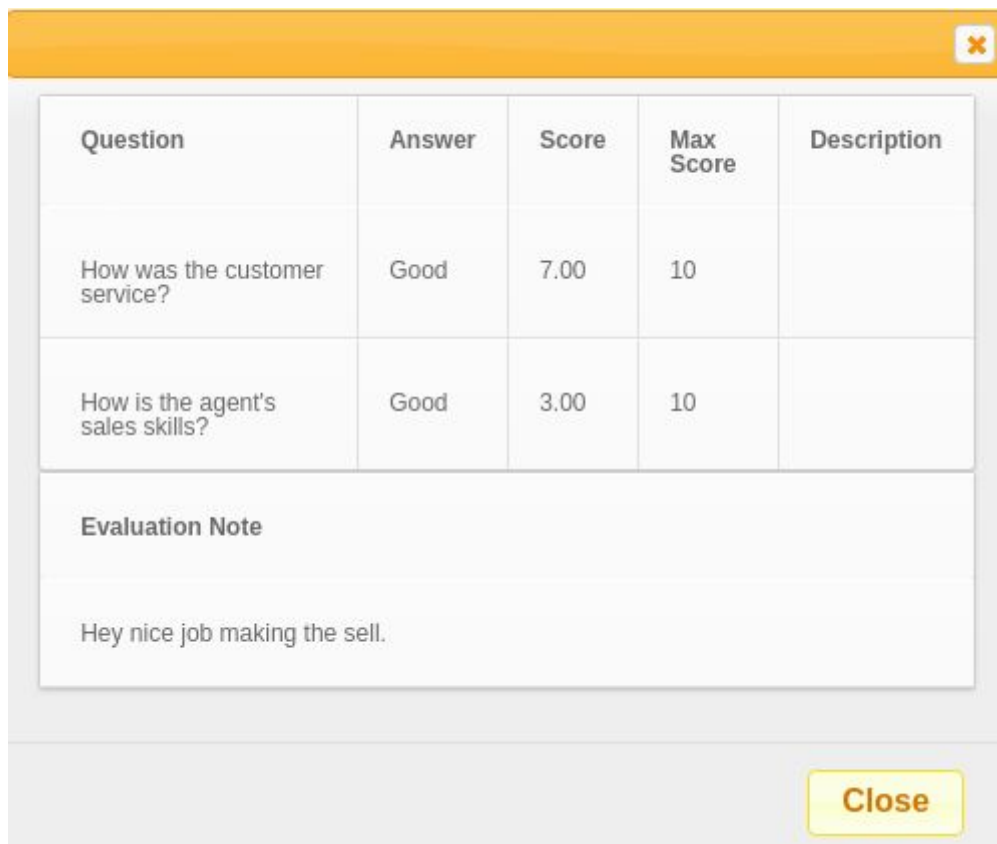
Note: volume can be adjusted using the bar shown below:



3. Click the close button,  .

Viewing Supervisor Comments from an Evaluation

1. Click the “Detail” button,  , under the evaluation detail column on the evaluation. The following pop-up will appear:



The pop-up window displays evaluation data in a table format. It includes a table with columns for Question, Answer, Score, Max Score, and Description. Below the table is a section for the Evaluation Note, which contains the text 'Hey nice job making the sell.' A Close button is located at the bottom right of the window.

Question	Answer	Score	Max Score	Description
How was the customer service?	Good	7.00	10	
How is the agent's sales skills?	Good	3.00	10	

Evaluation Note

Hey nice job making the sell.

Close

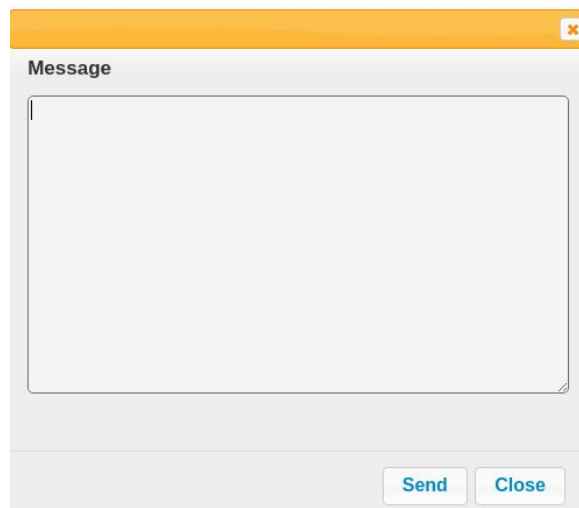
Note: Evaluations questions, answers, agent scores, max scores, and evaluation notes can all be viewed from the evaluation detail pop-up window.

-
3. To exit the evaluation window, click the close button,


A yellow rectangular button with the word "Close" in orange text.

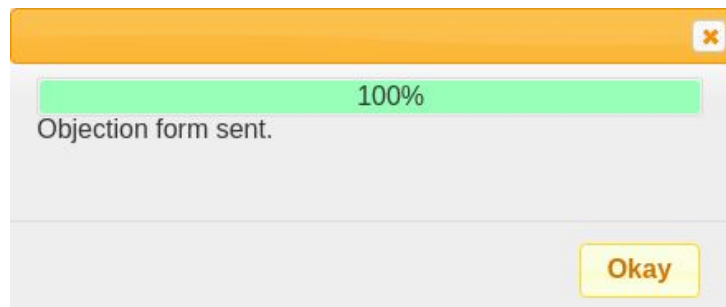
Commenting on an Evaluation


1. Click the “Object To” button, Object To, under the objection column on the evaluation. The following pop-up will appear:



2. Click the message input box, type a message to be sent to the supervisor.

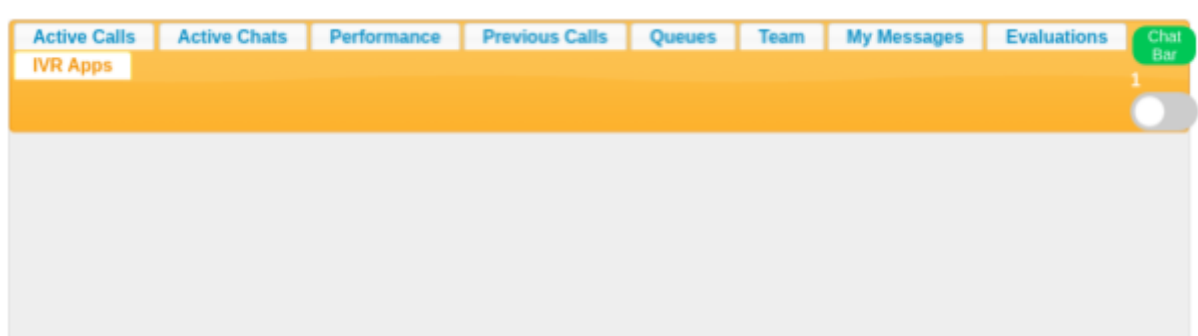
3. Click the send button, , the following confirmation window will be displayed:



4. Click the okay button, , to return to the agent screen.

IVR Apps

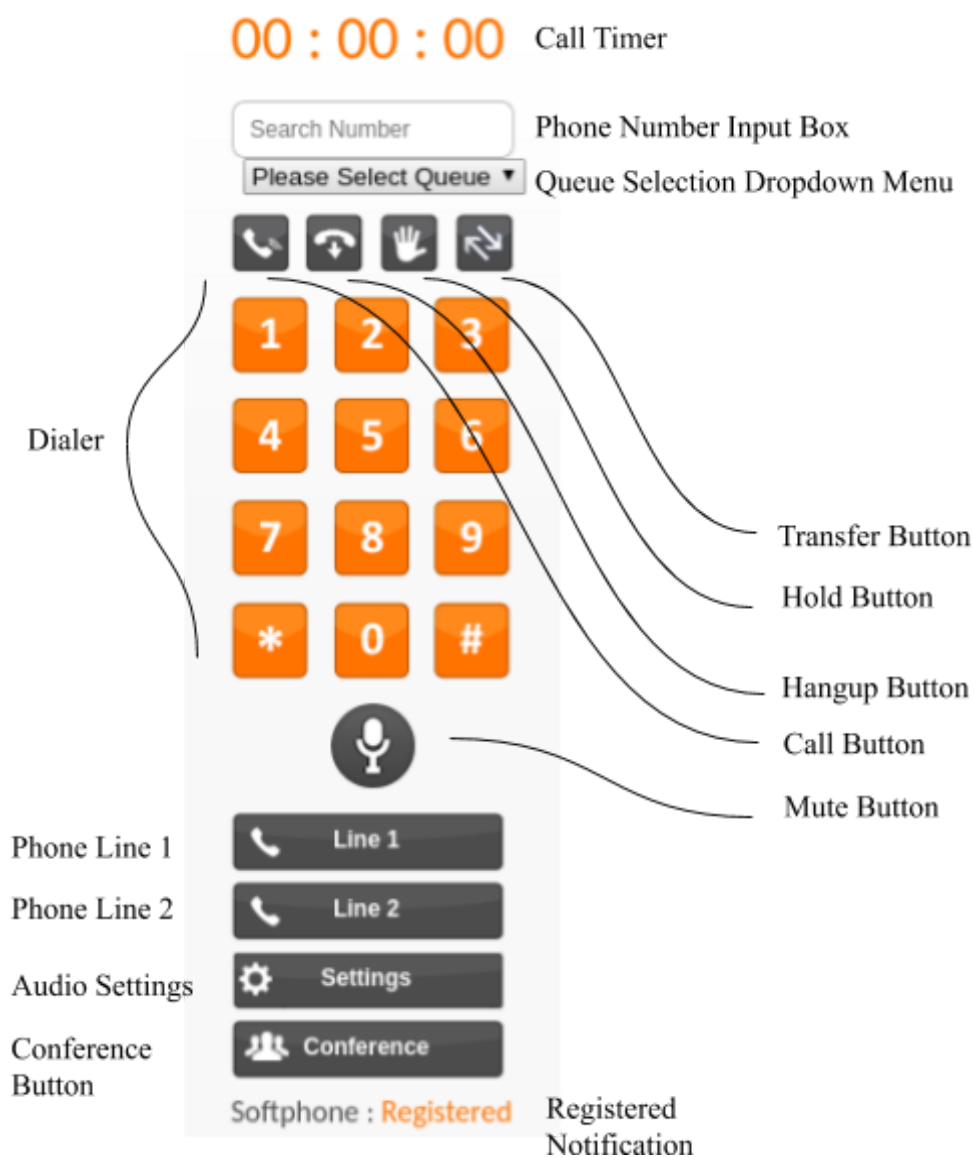
The IVR apps section is displayed here. It is blank because there are numerous IVR apps that the Call Center Studio development team can add according to your operation. (For more information on IVR apps or to have one added, contact the assigned Call Center Studio Program Manager).



Softphone

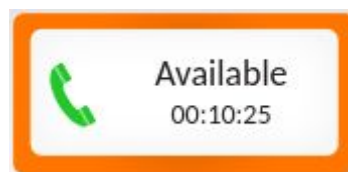
The softphone is used by the agent for manual dialing, transferring, talking to multiple customers, conference calls, settings adjustments, holds, and hangups.

An example of the softphone with descriptions is shown below:



Receiving a Call

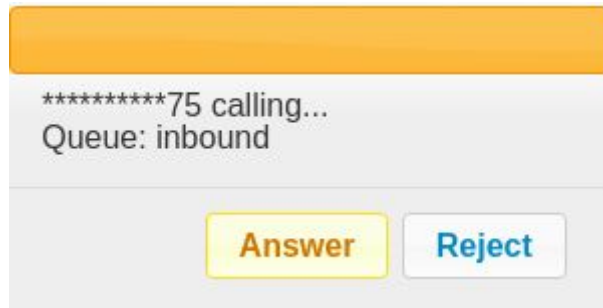
1. Check registered notification, **Softphone : Registered**, located at the bottom of the softphone (see softphone image). If “Registered” is not visible, check the network connection.
2. Click Available Status, once clicked, the status will be highlighted in orange, as shown below:



3. Click the queue selection dropdown menu, **Please Select Queue ▼**, select the desired queue, an example queue selection is shown below:

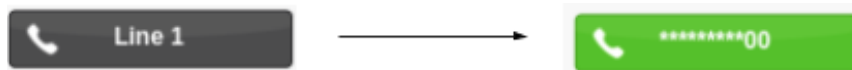


4. When an inbound call comes in the following pop-up window will be displayed:



The following transitions also occur:

Line 1 shown in gray will change to green, as shown below:



Ringing will illuminate in orange, as shown below:



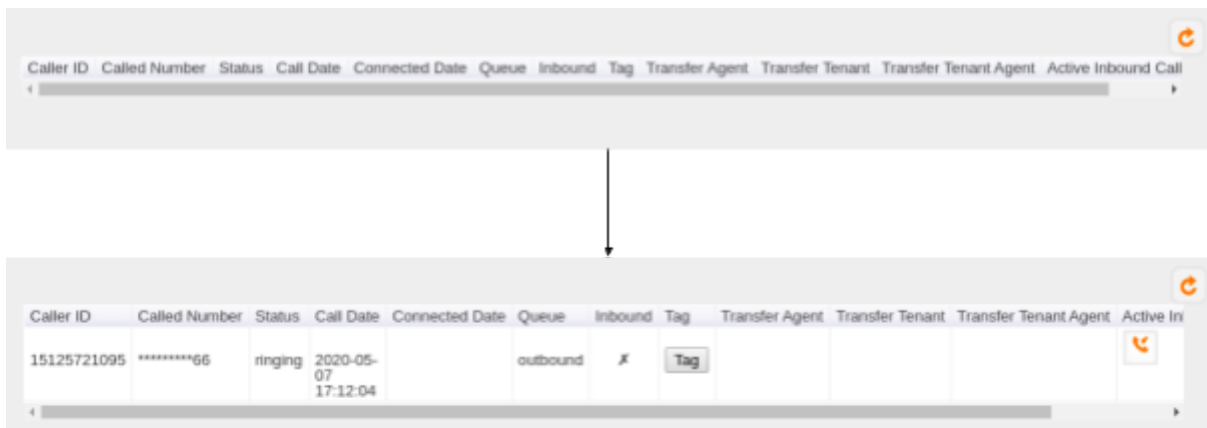
The "Available" button will transition, as shown below:




The Call Timer will start timing the ringing time, as shown below:

00 : 00 : 00 → 00:00:10

The Agent panel will display the call, as shown below:



Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Inbound Call
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

- Click the Answer button, **Answer**. The following transitions will occur:

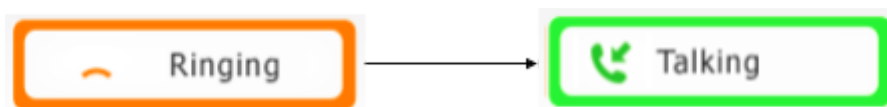
The available button will transition, as shown below:




The Call Timer will start timing the call as shown below:

00 : 00 : 00 → 00:00:10


The illuminated ringing status will transition to illuminated calling status, as shown below:



The displayed call status in the Agent panel will change from ringing to talking, as shown below:

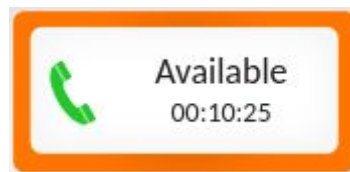
Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

↓

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				


Making a Call

1. Check registered notification, **Softphone : Registered**, located at the bottom of the softphone (see softphone image). If “Registered” is not visible, check the network connection.
2. Click Available Status, once click it will be highlighted in orange, as shown below:




3. Click the queue selection dropdown menu, **Please Select Queue ▼**, select the desired queue, an example queue selection is shown below:



4. Click the phone number input box, , type the desired phone number using the Dialer (as displayed in the softphone image) or use the computer's keyboard, an example is shown below:

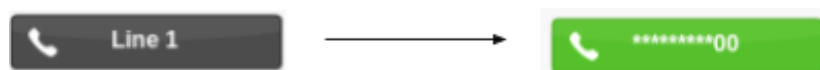


5. Click the Call Button, , or the Enter key (found on keyboard), once the call is dialed the following will take place as shown below:

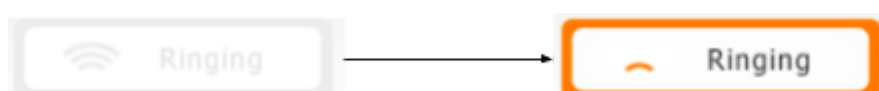
The available button will transition, as shown below:



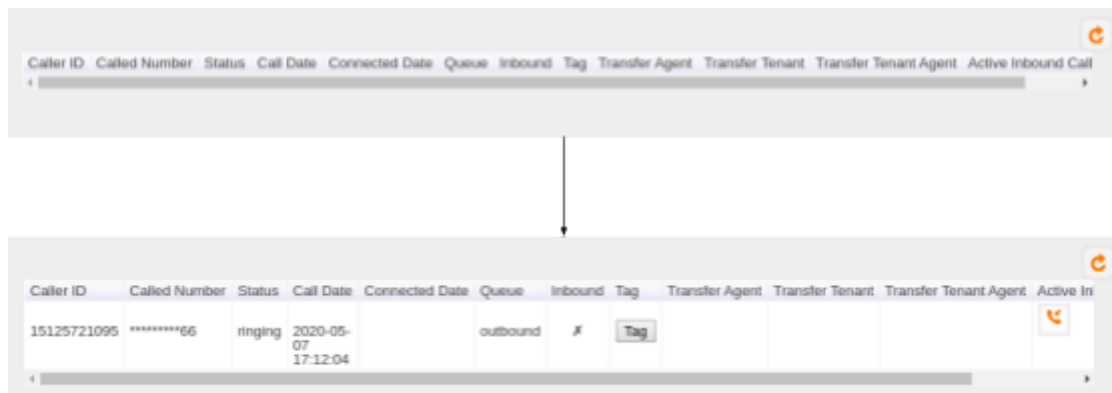
Line 1 shown in gray will change to green, as shown below:



Ringing will illuminate in orange, as shown below:



The Agent panel will display the call, as shown below:



The diagram shows a call being selected from a list and then opening in a detailed view. The detailed view shows the following data:

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Inbound Call
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

6. Once the call is answered, the following will take place, as shown below:


The Call Timer will start timing the call as shown below:

00 : 00 : 00 → 00:00:10


The illuminated ringing status will transition to illuminated calling status, as shown below:




The displayed call status in the Agent panel will change from ringing to talking, as shown below:

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	ringing	2020-05-07 17:12:04		outbound	X	Tag				

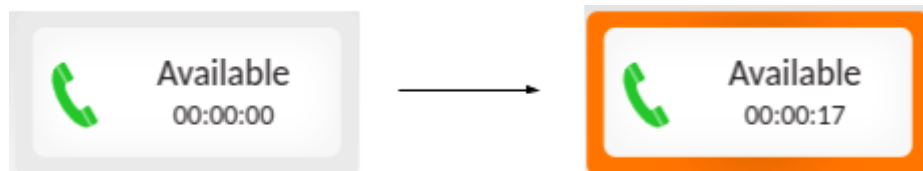
↓

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				

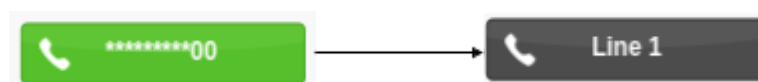
Ending a Call

- Click the Hangup Button, , the following transitions will take place as explained below:

The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in green line 1 will transition to gray:




The Call Timer will stop the call, as shown below:

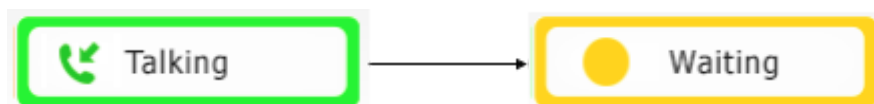
00:00:10

Note: The call timer will display the most recent call time.

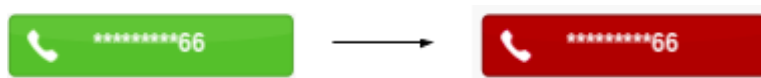
Putting a Call on Hold

1. While a call is in progress, click the Hold Button,  , the following transitions will take place as explained below:

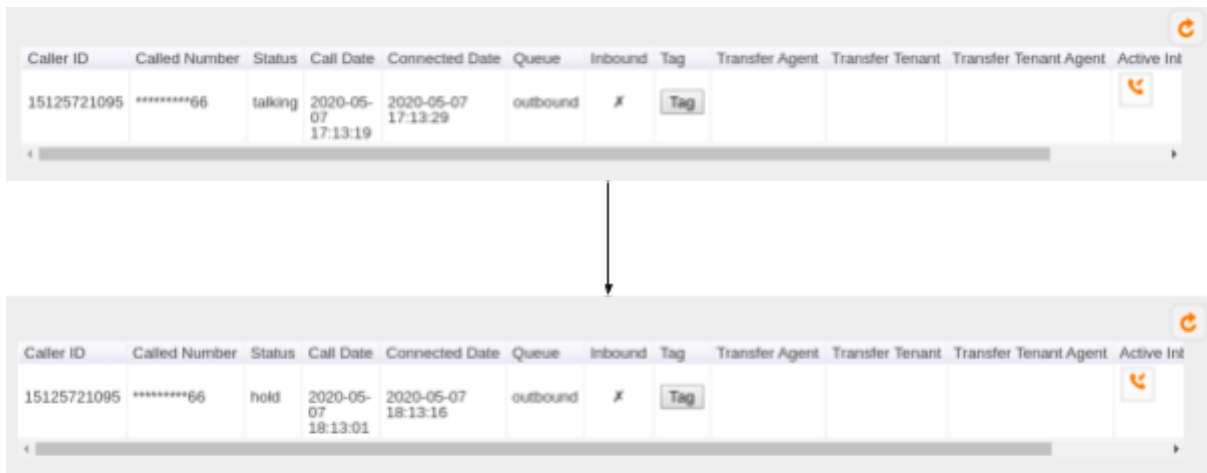
The talking status will transition to the waiting status, as shown below:





Line 1 will change from green to red, as shown below:



The displayed call status in the Agent panel will change from talking to holding, as shown below:

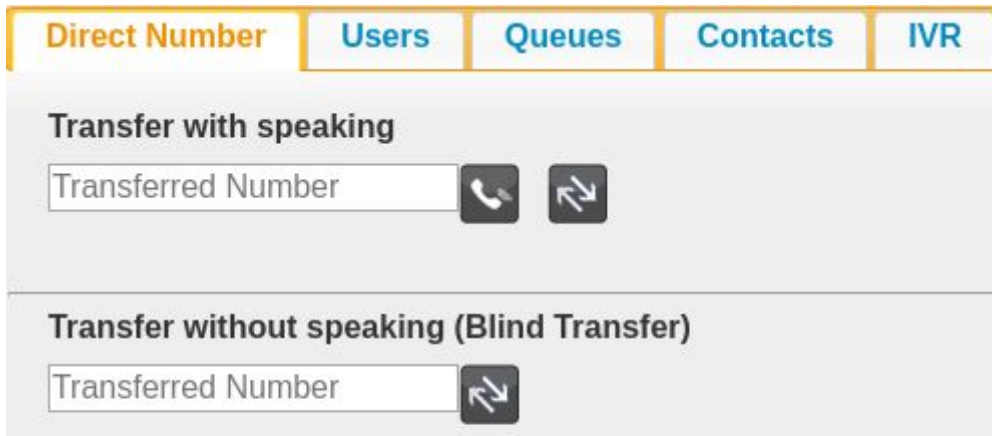


Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	X	Tag				

Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****66	hold	2020-05-07 18:13:01	2020-05-07 18:13:16	outbound	X	Tag				

Performing a Call Transfer

1. While on a call click the transfer button, , the following input box will appear:



The screenshot shows a software interface for performing a call transfer. At the top, there is a horizontal menu with five tabs: "Direct Number" (highlighted in orange), "Users", "Queues", "Contacts", and "IVR". Below the menu, there are two main sections. The first section is titled "Transfer with speaking" and contains a text input field labeled "Transferred Number" followed by two icons: a telephone handset and a transfer button (two arrows forming a square). The second section is titled "Transfer without speaking (Blind Transfer)" and contains a similar text input field labeled "Transferred Number" followed by a transfer button icon.

There are four ways to transfer:

Direct Number

To transfer via direct number:

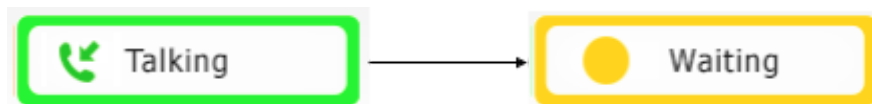
Transfer with speaking

1. Click the Transfer with speaking input button,
type the desired number for the transfer.

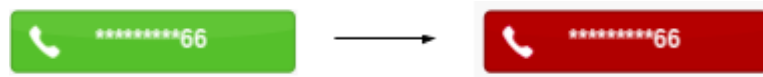


2. Click the call button, , the following will take place,

The talking status will transition to the waiting status, as shown below:




Line 1 will be placed on hold:



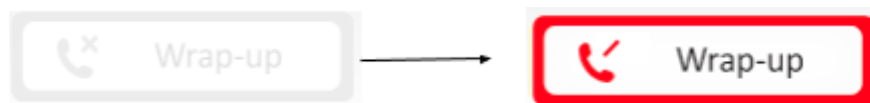
Line 2 will illuminate in green:



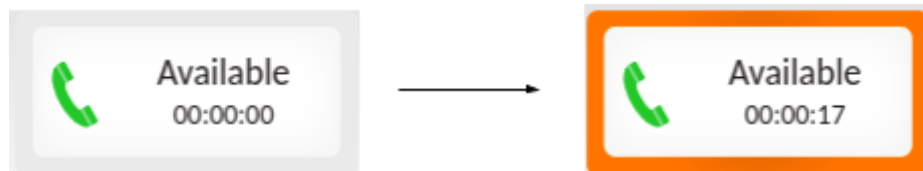
3. Once Line 2 answers the phone, the agent can explain the situation to the caller on line 2.

4. After explaining the situation, click the transfer button, , the transition will take place:

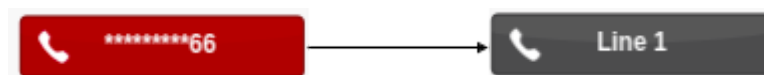
Wrap-up call status will illuminate:



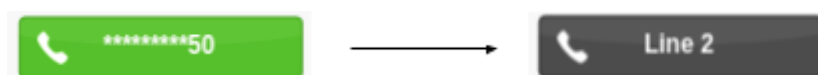
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in red, line 1 will transition to gray:

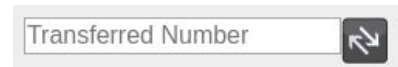


The illuminated in green, line 2 will transition to gray:



Transfer without speaking

1. Click the Transfer without speaking the input button, type the desired number for the transfer.

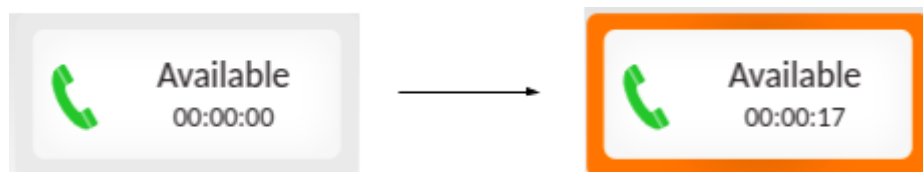


2. Click the transfer button, , the following will take place.

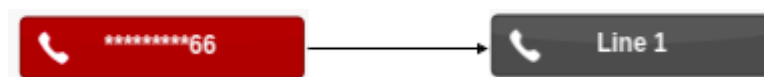
Wrap-up call status will illuminate:




The available button will illuminate again in orange (timer will begin again for available status):

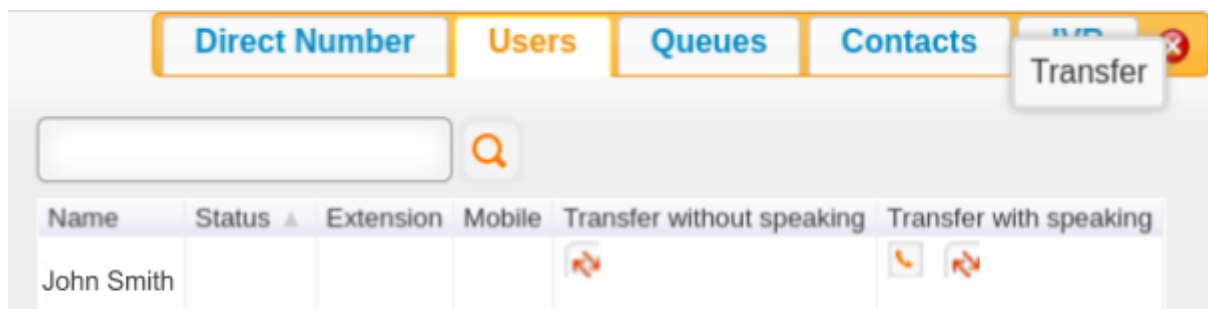


The illuminated in redline 1 will transition to gray:



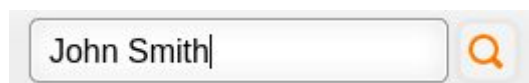
Users


- To transfer a call to a Call Center Studio user, click the “Users” tab . The following screen will be shown below:



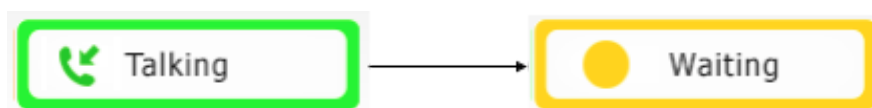
Transfer with speaking

- Click the search input, type the desired user’s name, as shown below:

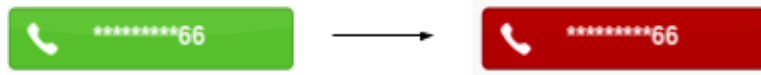


- Click the call button,  located under the Transfer with speaking column, for the desired user. The following will take place:

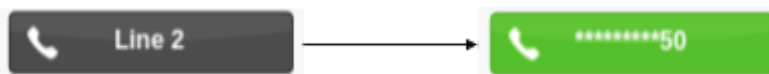
The talking status will transition to the waiting status, as shown below:





Line 1 will be placed on hold:



Line 2 will illuminate in green:



3. Once Line 2 answers the phone, the agent can explain the situation to the user on line 2.

4. After explaining the situation, click the transfer button,  located to the right of the call button , the transition will take place:

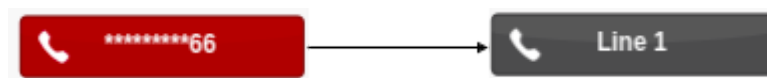
Wrap-up call status will illuminate:



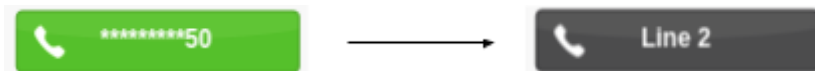
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in redline 1 will transition to gray:

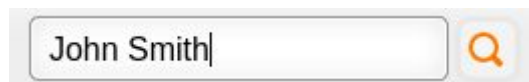



The illuminated in green line 2 will transition to gray:



Transfer without speaking

1. Click the search input, type the desired user's name, as shown below:

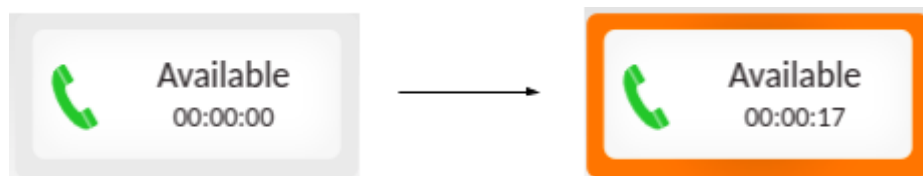


2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

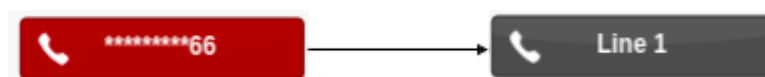
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):

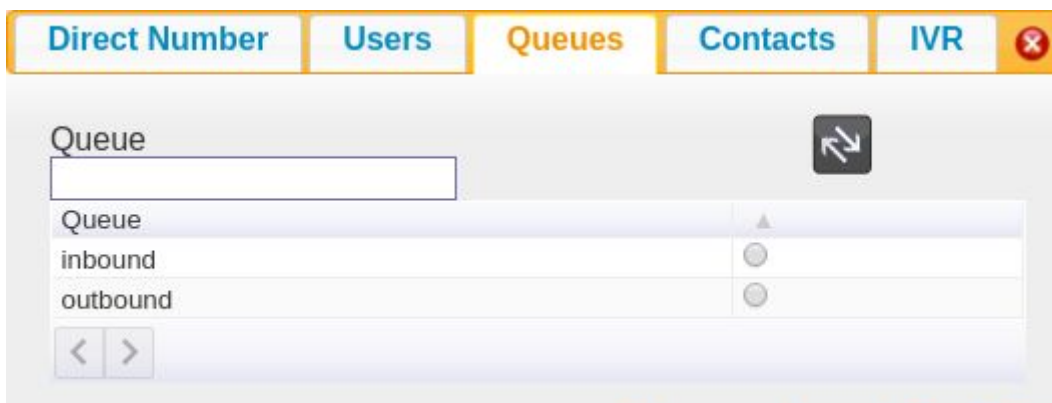


The illuminated in redline 1 will transition to gray:

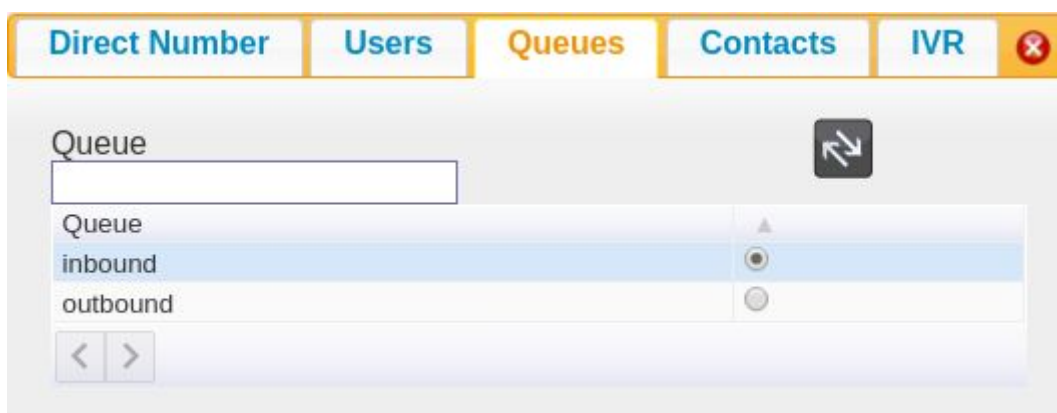


Queues

1. To transfer a call to another queue, click the queues tab **Queues**. The following screen will be shown below:



2. Use the search box or directly search for a queue. Click the radio button for the desired queue; an example is shown below:

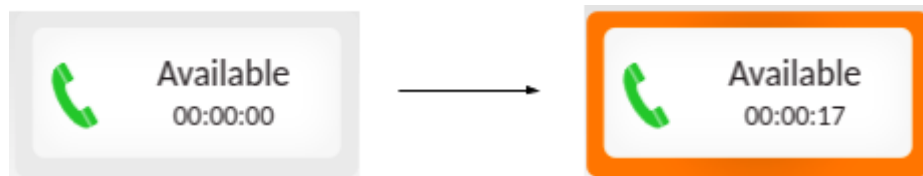


3. Click the transfer button, , the following will take place.

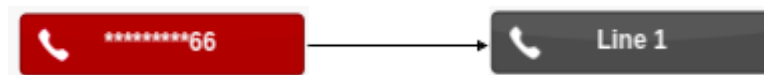
Wrap-up call status will illuminate:




The available button will illuminate again in orange (timer will begin again for available status):

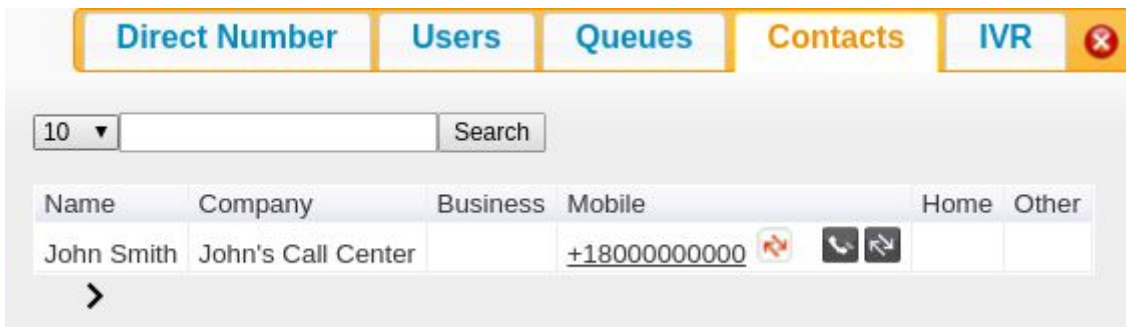


The illuminated in redline 1 will transition to gray:



Contacts

1. To transfer a call to contact, click the contacts tab . The following screen will be shown below:




The screenshot shows the 'Contacts' tab selected in the top navigation bar. Below the navigation bar, there is a search section with a dropdown menu set to '10', a text input field, and a 'Search' button. Below the search section is a table with the following columns: Name, Company, Business, Mobile, Home, and Other. The table contains one row with the following data: Name: John Smith, Company: John's Call Center, Business: (empty), Mobile: +18000000000, Home: (empty), and Other: (empty). To the right of the Mobile number are three icons: a red 'X', a telephone handset, and a double-headed arrow. Below the table is a right-pointing arrow icon.

Name	Company	Business	Mobile	Home	Other
John Smith	John's Call Center		+18000000000		

Transfer with speaking

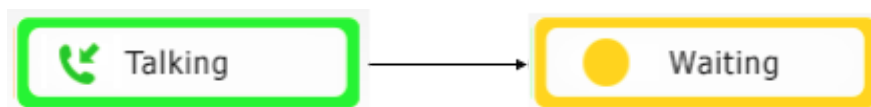
1. Click the search input, type the desired contact's name, as shown below:



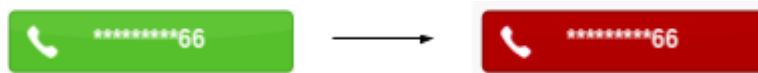
2. Click the call button,  located under the mobile column, for the desired contact.

The following will take place:

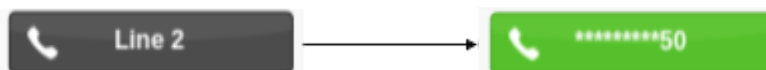
The talking status will transition to the waiting status, as shown below:





Line 1 will be placed on hold:



Line 2 will illuminate in green:



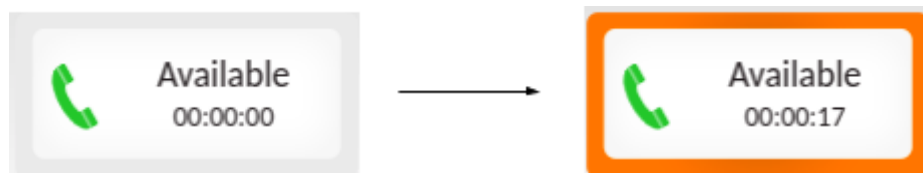
3. Once Line 2 answers the phone, the agent can explain the situation to the contact on line 2.

4. After explaining the situation, click the transfer button,  located to the right of the call button , the transition will take place:

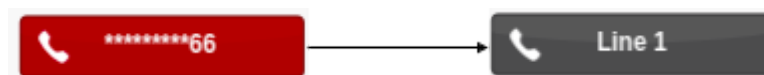
Wrap-up call status will illuminate:



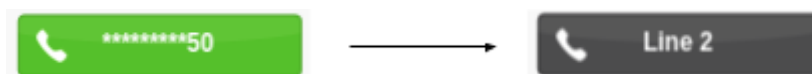
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in redline 1 will transition to gray:




The illuminated in green line 2 will transition to gray:



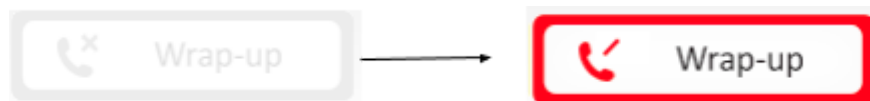
Transfer without speaking

1. Click the search input, type the desired contact's name, as shown below:

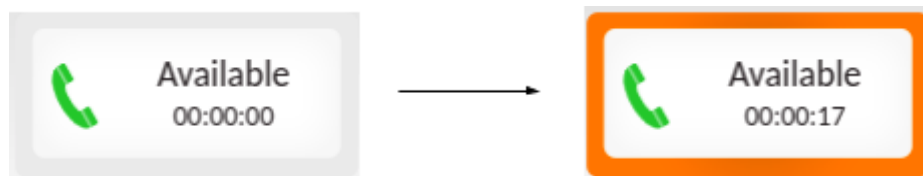


2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

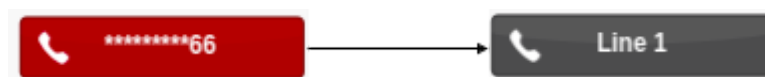
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):




The illuminated in redline 1 will transition to gray:



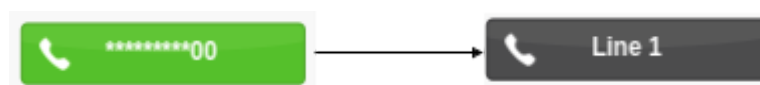
IVR

- To transfer a call to an IVR, click the contacts tab **IVR**. The screen below shows some IVR examples:



- Click the radio button, ☐, for the desired IVR.
- Click the transfer button, . The following transitions will occur:

The illuminated in green line 1 will transition to gray:



The Call Timer will stop the call, as shown below:

00:00:10

Note: The call timer will display the most recent call time.

Wrap-up call status will illuminate:



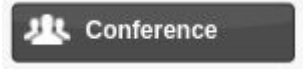
Making a Conference Call

Conference calls are used so that the agent can talk to two people at the same time, such as a supervisor and a customer. There are two ways to perform a conference call:

- Using the Transfer button
- Using Line 2 directly

Using the Transfer button

1. After placing or receiving a call on line 1, click the transfer button (any of the transfer methods that provide a transfer with speaking option can be used, See *Performing a Call Transfer Section*)
2. After line 2 is in talking status (do not hit the transfer button), click the conference

button, , the following transitions will take place:

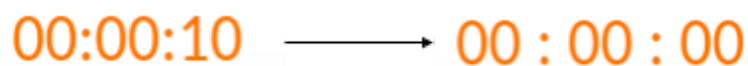
Line 1 will change to green, indicating that the conference call is now active on line 1:



The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:



The Active calls will be displayed like the example below:

Active Calls

Active Chats

Performance

Previous Calls

Queues

Team

My Messages




Evaluations

Chat Bar

IVR Apps

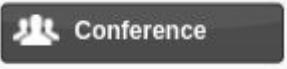
Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.

Using Line 2 Directly

1. After placing or receiving a call on line 1, click the hold button, .
2. Click, Line 2, .
3. Click the phone number input box, , type the desired phone number using the Dialer (as displayed in the softphone image) or a computer keyboard, an example is shown below:



+18140000000

4. Once Line 2 's in taking status, click the conference button, , the following transitions will take place:

Line 1 will change to green, indicating that the conference call is now active on line 1:





The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:

00:00:10 → 00 : 00 : 00

The Active calls will be displayed like the example below:

<div> <div>Active Calls</div> <div>Active Chats</div> <div>Performance</div> <div>Previous Calls</div> <div>Queues</div> <div>Team</div> <div>My Messages</div> <div>Evaluations</div> <div>Chat Bar</div> </div>											
IVR Apps											
Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active Int
15125721095	*****54	talking	2020-05-11 16:26:59	2020-05-11 16:27:44	outbound	X	Tag				
15125721095	*****53	hold	2020-05-11 16:26:17	2020-05-11 16:26:34	outbound	X	Tag				

Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.

Quality Control Screen



The quality control screen is used to view calls and chats (active and non-active), transfers, voicemails, and satisfaction surveys. Call records can also be listened to here. Also, this data can be reviewed to determine proper agent performance.

Calls Tab

By clicking the calls tab, , the following information can be viewed:

Call Records
Chat Records
Active Chats
Abandoned Calls from Queues
Transferred Calls
Voicemail & Callback Request Calls
Satisfaction Survey

Each of these tabs is discussed in detail below:



Call Records


The call records screen is shown below:

Number <input type="text"/>	Start Date <input type="text"/>	End Date <input type="text"/>	Agent <input type="text"/>	Queue <input type="text"/>
Unique ID <input type="text"/>	Start Time <input type="text"/>	End Time <input type="text"/>	Show only active agents <input type="checkbox"/>	Call ID <input type="text"/>
Call Type <input type="text"/>	Tag <input type="text"/>	Wrapup Code <input type="text"/>	Custom Variables <input type="text"/>	

25	Caller	Called Number	Queue	Call Type	Agent	Talk Duration	Voicemail Duration	Date	Answered	Evaluation Score	Wrapup Code	Tags	Black List
	15125721095	*****32	Inbound	Outbound		00:00:00	00:00:00	2020-05-13 15:36:02					X
	15125721095	*****74	Inbound	Outbound		00:00:00	00:00:00	2020-05-13 15:36:02					X
	15125721095	*****01	Inbound	Outbound		00:00:00	00:00:00	2020-05-13 15:36:02					X
	15125721095	*****49	Inbound	Outbound		00:00:00	00:00:00	2020-05-13 15:35:36					X
	15125721095	*****21	Inbound	Outbound		00:00:00	00:00:00	2020-05-13 15:35:36					X
	15125721095	*****46	Inbound	Outbound	Gerald Blanchard	00:00:09	00:00:00	2020-05-13 15:34:38	✓				X
	15125721095	*****36	Inbound	Outbound	Jared Walter	00:00:29	00:00:00	2020-05-13 15:34:38	✓				X
	15125721095	*****90	Inbound	Outbound	Vincent Warner	00:00:48	00:00:00	2020-05-13 15:34:35	✓				X
	15125721095	*****72	Inbound	Outbound	John Smith	00:00:07	00:00:00	2020-05-13 15:34:33	✓			testing	X

Exporting Call Records

1. Click the export button,  , located in the top right-hand corner to the left of the search button,  .
2. The file will be downloaded in .CSV format.

Note: using the records filter,  , up to a 100 call records can be shown on a single page in the call center studio tenant

Searching Call Records

Call Records can be searched in multiple different ways:

Number

1. Click the “Number” input box, type the desired phone number of the call records. An example is shown below:



Number

15125721095

2. Click the search button,  .

Unique ID

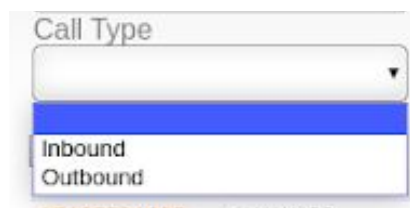
1. Click the Unique ID input box, type the unique ID an example is shown below (The Unique ID can be found in the Reporting tab under Call Details, once the report is downloaded via .CSV, the unique call ID, will be shown. The unique ID can also be used to match the call records to the CRM used):


A screenshot of a web form with a label "Unique ID" above a single-line text input box.

2. Click the search button, .

Call Type

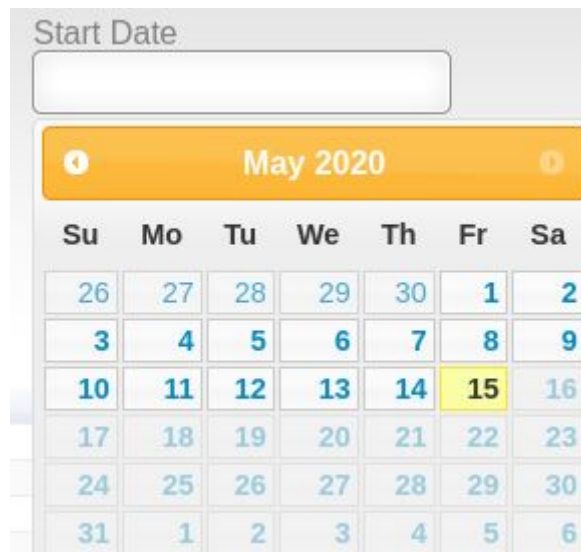
1. Click the Call Type input box. The following dropdown list will appear:

A screenshot of a web form with a label "Call Type" above a dropdown menu. The dropdown menu is open, showing two options: "Inbound" and "Outbound". The "Inbound" option is highlighted with a blue background.


2. Make a selection from the dropdown list.
3. Click the search button, .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

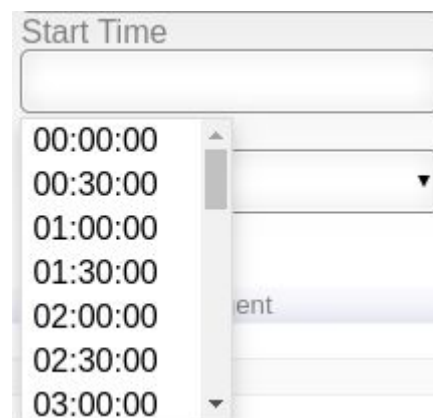


2. Click the desired start date


3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:



2. Select the desired start time.


3. Click the search button, .

Tag

1. Click the tag input box, an example dropdown menu with tags is shown below:

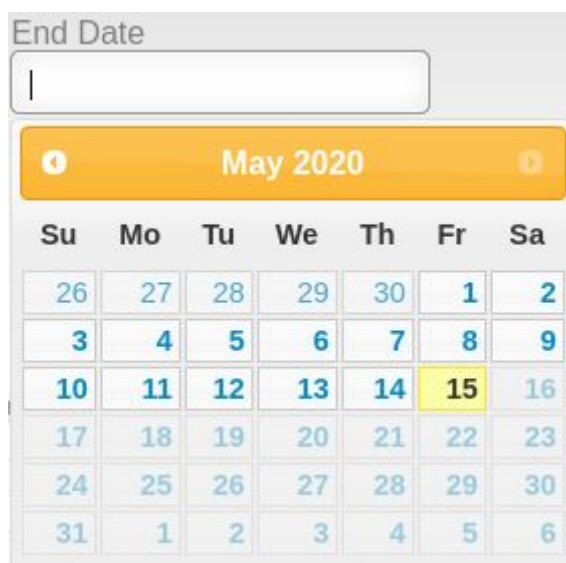


2. Select the desired tag.

3. Click the search button, .

End Date

1. Click the end date input box. The following calendar pop-up window will appear:

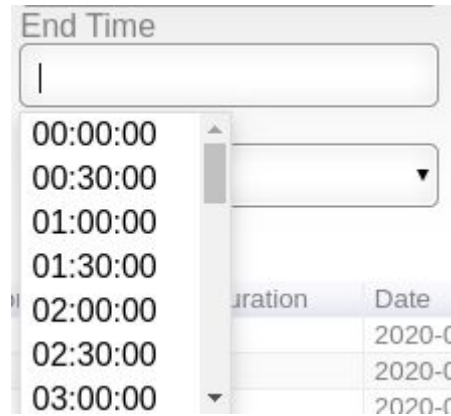


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

A screenshot of the "End Time" dropdown menu. The menu is open, showing a list of time options from 00:00:00 to 03:00:00 in 30-minute increments. To the right of the time list is a table with two columns: "Duration" and "Date". The "Duration" column is currently empty, and the "Date" column shows the date "2020-01-01".

Duration	Date
	2020-01-01
	2020-01-01
	2020-01-01

2. Select the desired end time.

3. Click the search button, .

Wrapup Codes

1. Click the wrapup codes input box. An example dropdown list is shown below:

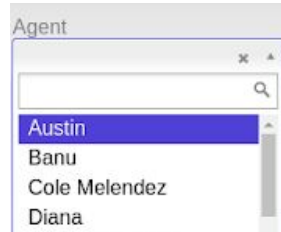


2. Select the desired wrapup code.

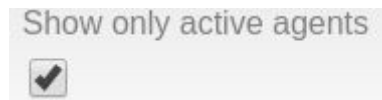
3. Click the search button, .

Agent

1. Click the agent input box. An example dropdown list is shown below:



Note: Only active agents can be filtered by checking the “Show only active agents” checkbox shown below:



2. Select the desired agent


3. Click the search button, .

Custom Variables

The custom variable is used for integrations via web service. For example, if the tenant uses a number masking web service, each agent has a unique ID. This ID can be searched for using this search box.

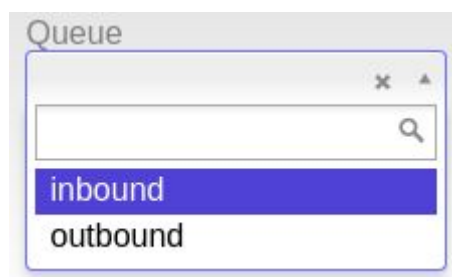
1. Click the custom variables input box.
2. Type the desired custom variable. The input box is shown below:


A screenshot of a web interface showing a text input box with the placeholder text "Custom Variables". The box is empty and has a light gray border.

3. Click the search button, .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:

A screenshot of a web interface showing a dropdown menu titled "Queue". The menu is open, displaying two options: "inbound" (highlighted in blue) and "outbound". There is a search icon in the top right corner of the dropdown.

2. Click the desired queue.
3. Click the search button, .

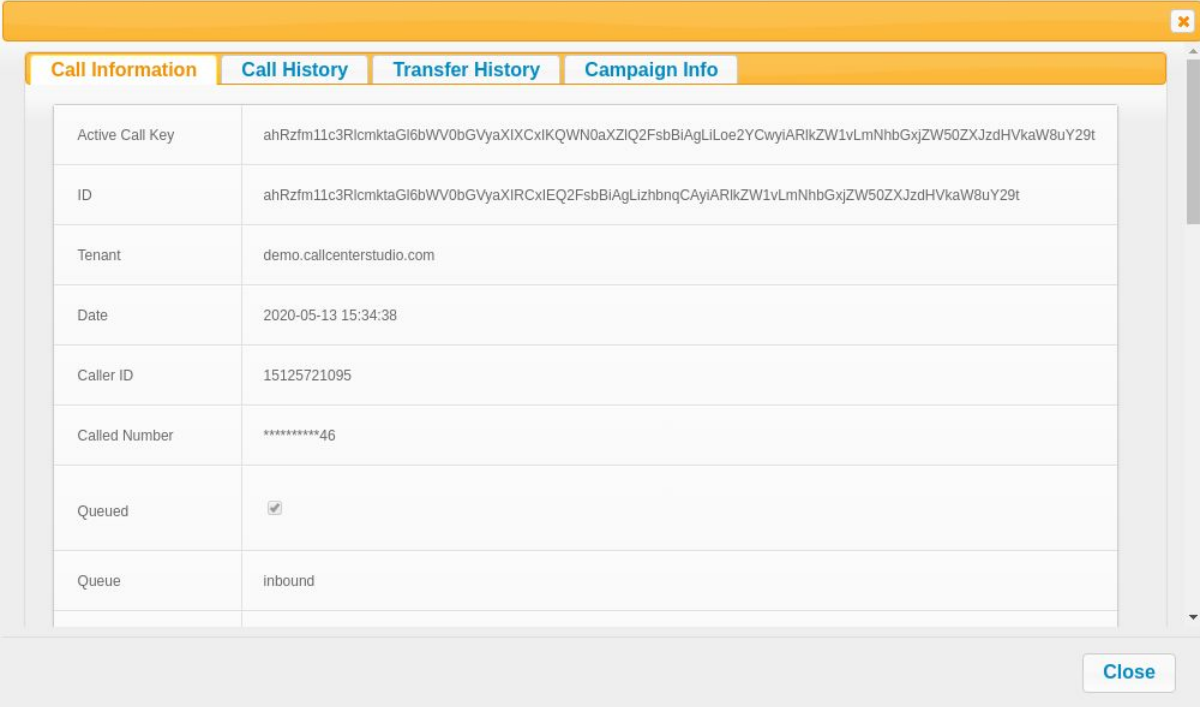
Call ID

1. Click the Call ID input box.
2. Type the desired call ID (Created when the call is passed through the system, can be found in Accessing Call Details > Active Call Key).

3. Click the search button,  .

Accessing Call Details

1. Under the Caller column, click the desired caller number highlighted in orange for more details. The following pop-up screen will be displayed:



The screenshot shows a pop-up window titled "Call Information" with a close button in the top right corner. Below the title bar are four tabs: "Call Information" (selected), "Call History", "Transfer History", and "Campaign Info". The main content area is a table with the following data:

Active Call Key	ahRzfm11c3RlcmktaGi6bWV0bGVyaXlXcXlEQ2FsbBIaGLiLoe2YCwyiARikZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
ID	ahRzfm11c3RlcmktaGi6bWV0bGVyaXlXcXlEQ2FsbBIaGLizhbnqCAyiARikZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
Tenant	demo.callcenterstudio.com
Date	2020-05-13 15:34:38
Caller ID	15125721095
Called Number	*****46
Queued	<input checked="" type="checkbox"/>
Queue	inbound

A "Close" button is located at the bottom right of the pop-up window.

Call Information

Under the call information tab, the row headings are explained in detail below:

Active Call Key	When a call starts, the application creates a unique key specific to that call.
ID	ID similar to Active Call Key logged for the call.
Tenant	Provides the URL name for the demo tenant
Date	Provides the date and time of the incoming call in the following format: YYYY-MM-DD HH:MM:SS
Caller ID	Provides agents phone numbers used for the call
Called Number	Provides the called number in the following format: *****XX
Queued	Displays a checkbox showing whether the call was queued or not.
Queue	Displays the name of the queue used by the agent
Call Type	Displays whether the call was inbound or outbound.
Queue Date	If the call was queued, the date and time will be displayed in the following format: YYYY-MM-DD HH:MM:SS

Assigned	Not every call has to be queued. The call may not enter a queue in the IVR to which the dialed number is forwarded. For example, if there is no queue step or for some reason such as there may be a bug, dialed out of office, etc., the call will not be queued. This checkbox indicates whether the call is queued.
Agent	Gives the name of the agent
Waiting Duration	The waiting duration is the amount of time the customer waited before connecting with an agent. (In seconds).
Answered	Shows whether the call was answered or not using a checkbox
Answered in SL	Based on the defined SL in Queues Section. For example, if the defined SL was 20 seconds, and the waiting duration was 15 seconds, this checkbox would be checked because it was answered in the defined SL.
Answer Date	Provides the date and time of the answered call in the following format: YYYY-MM-DD HH:MM:SS
Hang up Date	Provides the hangup date and time of the call in the following format: YYYY-MM-DD HH:MM:SS
Duration	Gives the call duration time.
Hold Count	The Hold count is the number of times the agent placed the customer on hold.
Hold Duration	Gives the total hold duration time

Local Release	If the agent hung up, “True” will be displayed. If the customer hung up, “False” will be displayed.
Abandoned	If the call rang on the agent screen, but the agent did not answer the call
Short Call	Based on the defined Short Call duration in Queues Section. For example, if the defined Short Call duration was 20 seconds, and the total talk time was 30 seconds, then the output would be “False” because it was longer than the short call duration.
Recording Uploaded	Displays a checkbox to show if the call recording was uploaded correctly.
Avg. Evaluation Score	Gives the agent’s average evaluation score if the supervisor made an evaluation.
Tags	If an agent or supervisor tagged the call, the tag will be displayed here.
Location	If the Queue used has a location assigned to it, then the location name will be displayed here.
Simulated Call	The administrator can make simulated calls. If a simulated call is performed, then the output will be “True.”
Simulation Date	If the simulated call output is “True,” then the simulated call date will be displayed.

Call History

By clicking the call history tab, **Call History**, the following screen will be displayed:

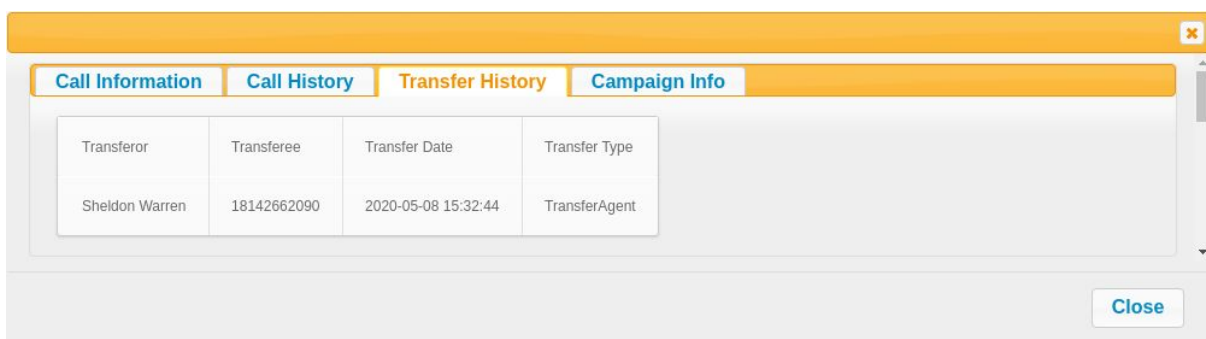


Category	Type	Start Date	Duration	Detail	Input
Queue	talking	2020-05-13 15:35:23	7	agent_name:yagiz.bostancioglu@alo-tech.com queue_name_get:inbound queue_name_active_call:inbound	
Hangup	Hangup	2020-05-13 15:35:30	0	release:False disposition:ANSWER	

Under the call history tab, information can be found, such as the call start time, duration, and when the call was disconnected.

Transfer History

By clicking the transfer history tab, **Transfer History**, the following screen will be displayed:



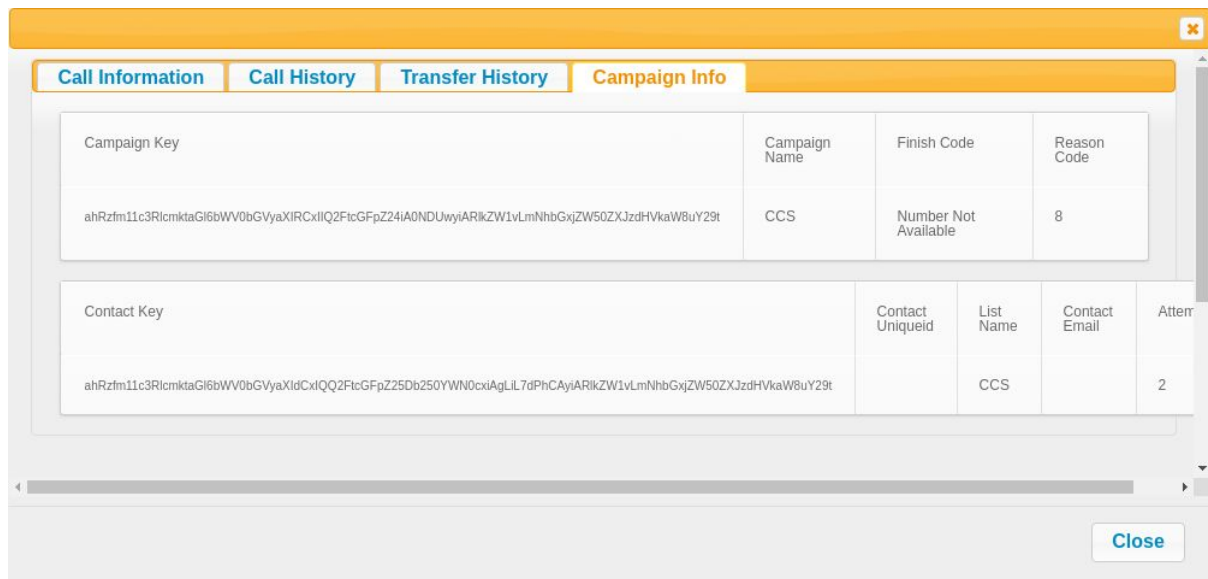
Transferor	Transferee	Transfer Date	Transfer Type
Sheldon Warren	18142662090	2020-05-08 15:32:44	TransferAgent

Close

Tab information can be found under the transfer history, such as the transferor's name, transferee's name, the transfer date, and the transfer type.

Campaign Info

By clicking the campaign info tab, **Transfer History**, the following screen will be displayed:



Campaign Key	Campaign Name	Finish Code	Reason Code
ahRzfm11c3RlcmktaGl6bWV0bGVyaXIRCxIIQ2FtcGFpZ24iA0NDUwyyiARlkZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t	CCS	Number Not Available	8

Contact Key	Contact Uniqueid	List Name	Contact Email	Attempts
ahRzfm11c3RlcmktaGl6bWV0bGVyaXIdCxlQQ2FtcGFpZ25Db250YWN0cxiAgLIL7dPhCAyIARlkZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t		CCS		2

Close

Under the campaign, info tab information can be found, such as the campaign key, campaign name, finish code, reason code, contact key, list name, contact email, and the number of attempts.



Call Recordings

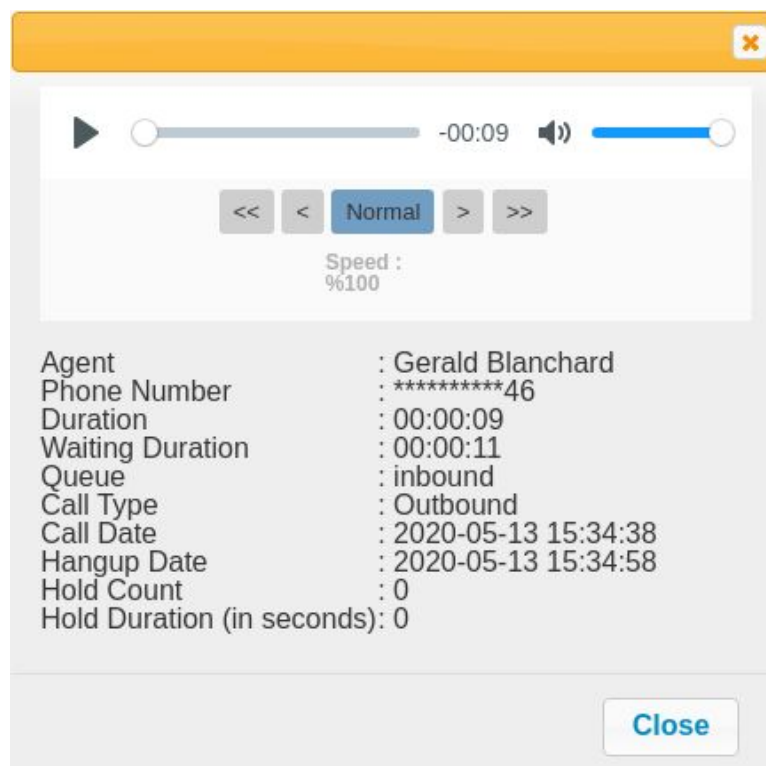
All calls are recorded by default when the call is in talking status. Recordings can be accessed by using the following buttons to the right of the call's row.

Downloading a Call Recording

1. Click the download button, , located to the right of the blacklist column.

Listening to a Call Recording

1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:




2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:





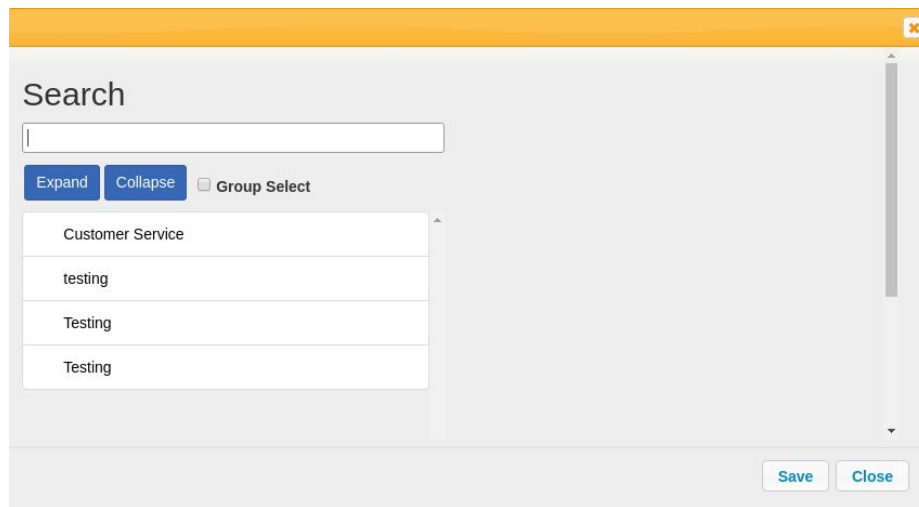
Note: volume can be adjusted using the bar shown below:



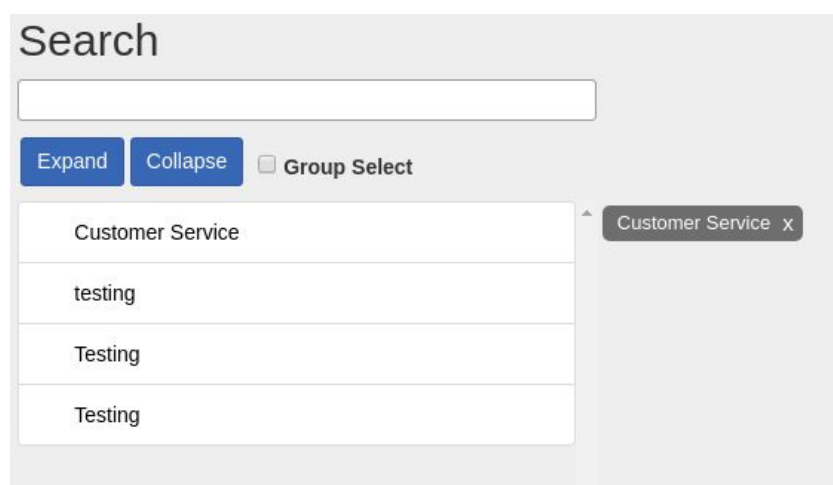
3. To exit the pop-up window, click the close button,  .

Tagging a Call


1. Click the tag button, , located to the right of the listen button, , the following pop-up will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox). Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:





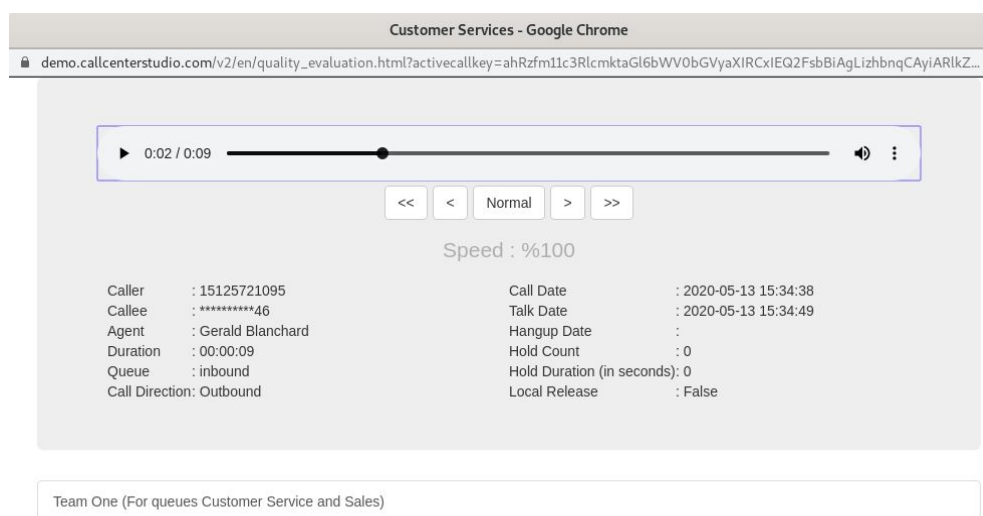
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

- Once all the desired tag selections have been made, click the save button, .

Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

Evaluating a Call

- Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:

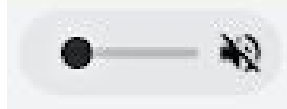




Note: An example evaluation was created (See Evaluations in the Administrator section).

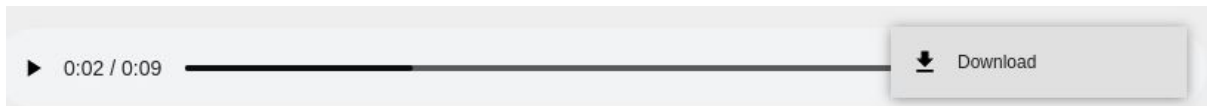
Recording speed can be adjusted (Between 50% and 150%) using the bar shown below:



Volume can be adjusted by clicking  and using the bar, as shown below:



Call Recording can be downloaded by clicking the three vertical dots, , to the right of the volume button, . And then clicking download as shown below:



2. Click the evaluation desired an example survey is shown below:

Team One (For queues Customer Service and Sales)

3. After clicking, the evaluation will be visible. The example is shown below:

Form List

☒ Customer Service →

☒ Sales Service →

Total : 0.00

Customer Service

Sales Service

Evaluation Note

Evaluation Type

Standard

☐ Hidden for agent

Total : 0.00

Cancel

Save

Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:

Form List

- ☒ Customer Service →
- ☒ Sales Service →

Total : 0.00

Customer Service

How was the customer service?

☐ Good

☐ Bad

Sales Service

How is the agent's sales skills?

☐ Good

☐ Bad

Evaluation Note

Evaluation Type

Standard ▼

☐ Hidden for agent

Total : 0.00

Cancel
Save

4. Fill out the necessary information on the form.

Note: By clicking the “Hidden for agent” checkbox, ☐ Hidden for agent , the evaluation will not be able to be seen by the agent.

Note: On evaluation type, there are two types in the dropdown box:

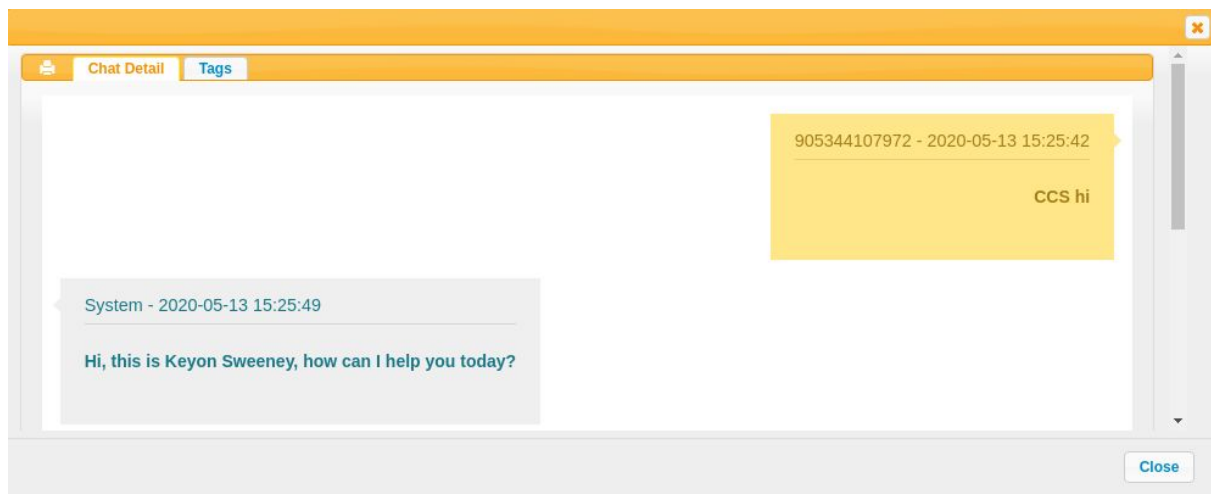
Standard - Used for evaluating the agent

Control - Used to reevaluate the agent based on a customer concern.

5. Click the save button, .


Chat Records

Under the insert date column, click the desired chat insert date highlighted in orange for more details. The following pop-up screen will be displayed:




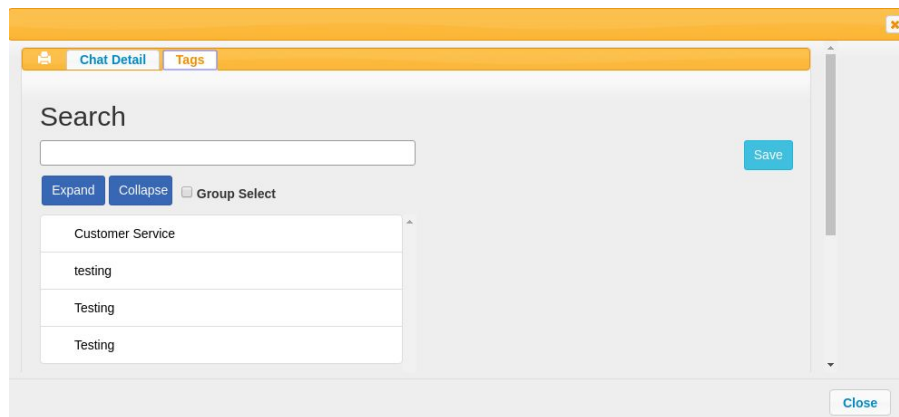
Chat Detail


The chat detail screen displays the chat in detail with customer and agent responses.

Note: The chat can be printed by selecting the print button,  , located in the top left corner.

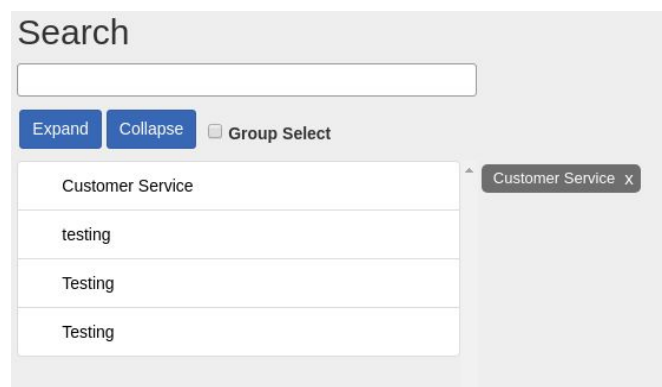
Tags

By clicking the Tags tab,  , the following screen will be displayed:




Note: A call can also be tagged, by clicking on the tag button,  , to the right of the subject column from the main Chat Records screen.

1. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox. Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:





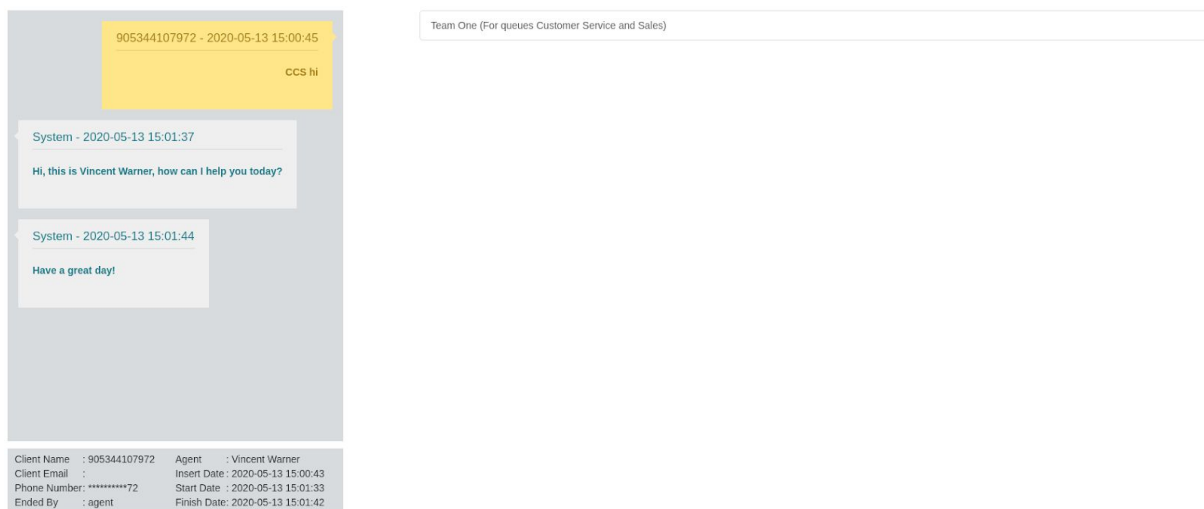
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

- Once all the desired tag selections have been made, click the save button, .

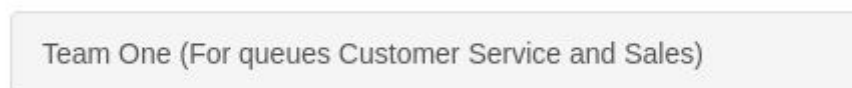
Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

Evaluating a Chat Record

- Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:



- Click the evaluation desired an example survey is shown below:




3. Fill out the necessary information on the form.

Note: By clicking the “Hidden for agent” checkbox, ☐ Hidden for agent , the evaluation will not be able to be seen by the agent.

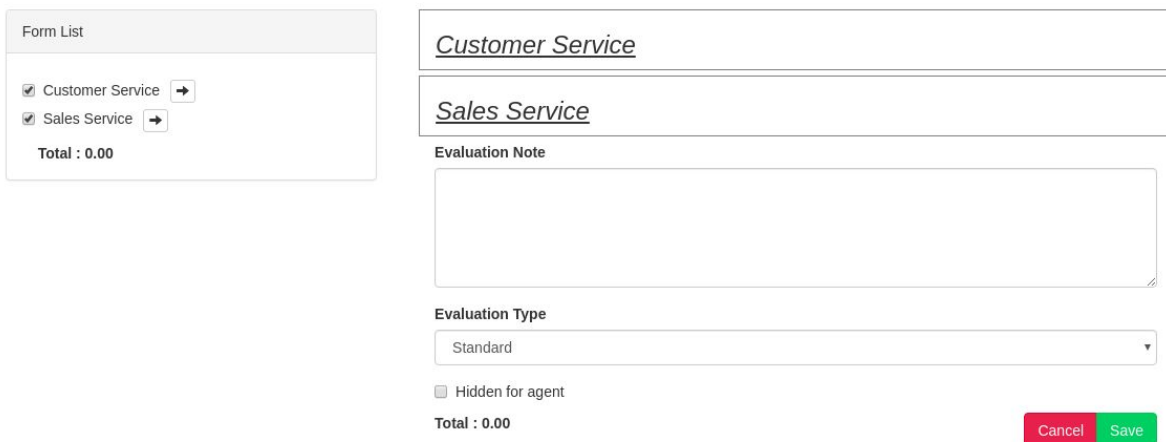
Note: On evaluation type, there are two types in the dropdown box:

Standard - Used for evaluating the agent

Control - Used to reevaluate the agent based on a customer concern.

4. Click the save button, .

5. After clicking, the evaluation will be visible. The example is shown below:



The screenshot displays the evaluation interface. On the left, a 'Form List' panel shows 'Customer Service' and 'Sales Service' as selected items, each with a right-pointing arrow. Below them, it states 'Total : 0.00'. The main form area on the right contains two input fields for 'Customer Service' and 'Sales Service'. Below these is a large text area for 'Evaluation Note'. Underneath the note is a dropdown menu for 'Evaluation Type' currently set to 'Standard'. At the bottom left of the form, there is a checkbox for 'Hidden for agent' and a 'Total : 0.00' label. At the bottom right, there are 'Cancel' and 'Save' buttons.

Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:

Form List

☒ Customer Service →

☒ Sales Service →

Total : 0.00

Customer Service

How was the customer service?

☐ Good

☐ Bad

Sales Service

How is the agent's sales skills?

☐ Good

☐ Bad

Evaluation Note

Evaluation Type

Standard ▼

☐ Hidden for agent

Total : 0.00


Cancel

Save

Active Chats

Active chats can be viewed in the active chats tab. Information on the chat, such as start date and time, agent name, client name/phone number, client email, queue, status, parking start date, and duration, can be viewed in the active chats list.


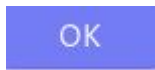
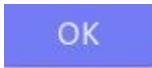
Closing an Active Chat

1. Click the close button, , located to the right of the duration column, once clicked the following pop-up window will appear:

demo.callcenterstudio.com says
Chat will be close?



Cancel

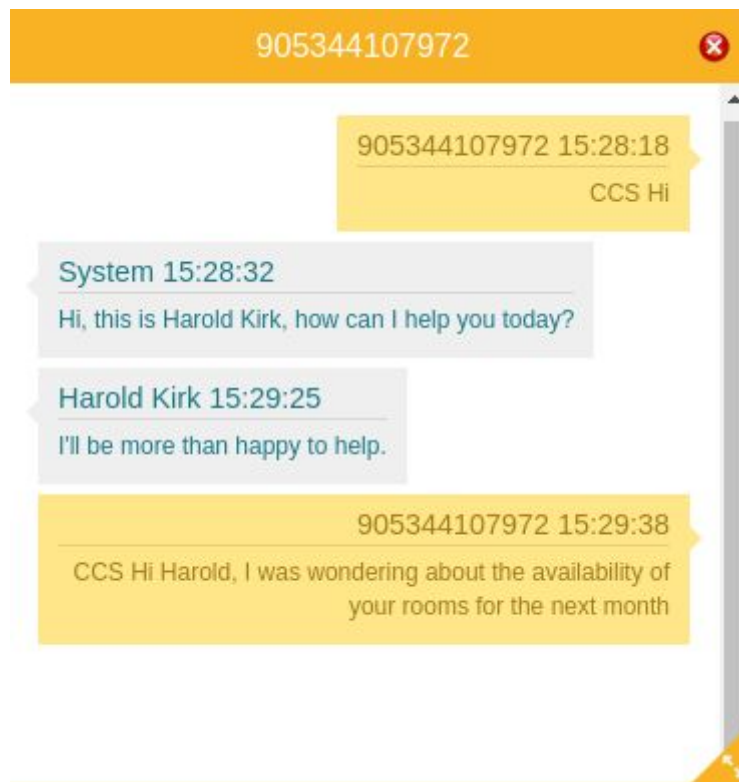
OK


- Select the cancel button, , to cancel the chat from being closed.
 - Select the OK button, , to confirm the closing of the chat.
2. Confirm by clicking the OK button, .

The screen will reload, and the closed chat will not be shown.

Viewing an Active Chat

1. Click the view/details button,  , located to the right of the close button,  , the following pop-up will appear:



2. Once viewing is complete, click the exit button,  , to return to the active chat list.

Viewing Active Chats on Parking Status

In the top left corner of the Active chat list check the “Show Only Parking Status” checkbox as shown below:



Note: Only chats on parking status can be viewed when this checkbox is checked. Parking status is used so that the agent can park a chat to continue at a later point in time when the customer begins to chat again.

Abandoned Calls from Queues



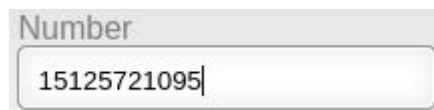
Caller ID	Call Date	Queue	Status	Callback Date	Callback Time	Callback User	Callback Disposition	Callback Recording
*****us	2020-07-16 19:09:19	inbound	Abandon Call					


Searching Abandon Calls from Queues

There are seven ways to search for abandon calls from queues explained below:

Number

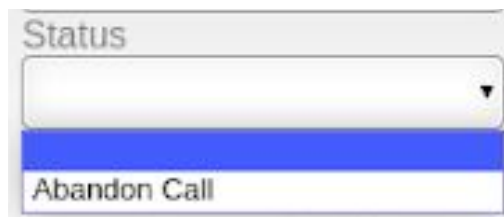
1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

A screenshot of a web form element. It has a light gray header with the label "Number". Below the header is a white input box with a thin gray border. Inside the input box, the phone number "15125721095" is typed, followed by a vertical cursor.

2. Click the search button, .

Status

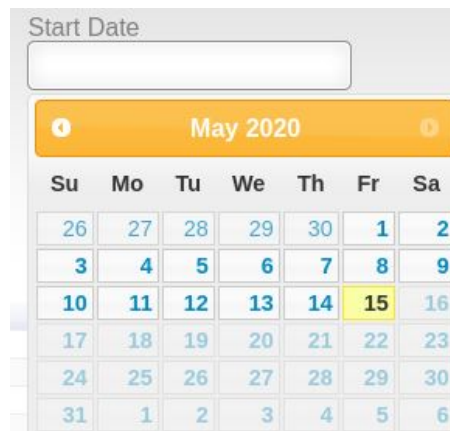
3. Click the Status dropdown box, select “Abandon Call” as shown below:

A screenshot of a web form element. It has a light gray header with the label "Status". Below the header is a white dropdown menu with a thin gray border and a small downward-pointing arrow on the right side. The dropdown menu is open, showing a list of options. The option "Abandon Call" is highlighted with a blue background.

4. Click the search button, .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:



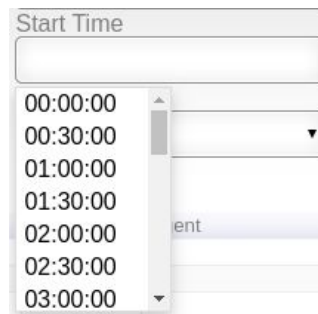
2. Click the desired start date



3. Click the search button, .

Start Time

1. Click the start time input box. The following dropdown list will appear:



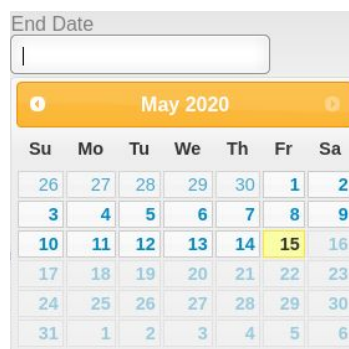
2. Select the desired start time.

3. Click the search button,



End Date

1. Click the end date input box. The following calendar pop-up window will appear:



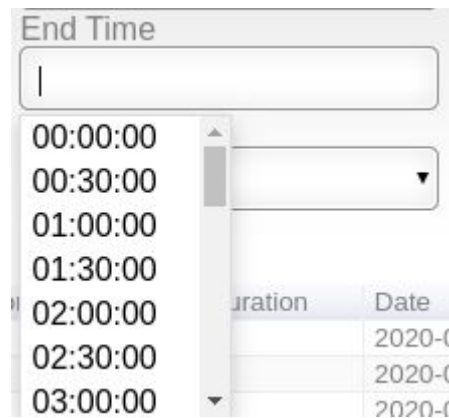
2. Click the desired end date

3. Click the search button,



End Time

1. Click the end time input box. The following dropdown list will appear:

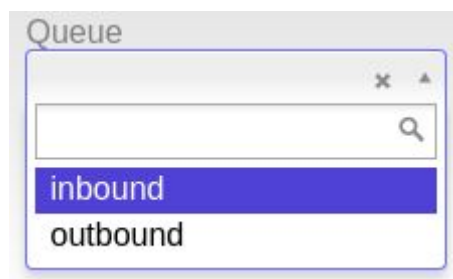


2. Select the desired end time.

3. Click the search button, .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:




2. Click the desired queue.

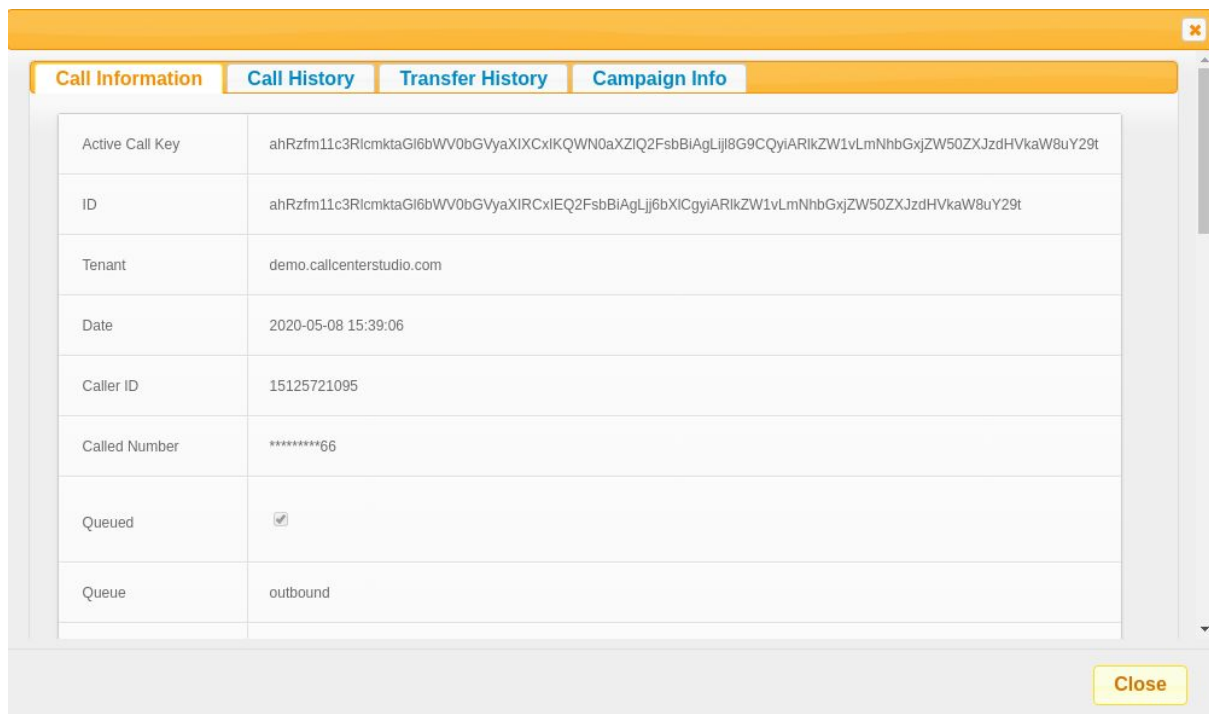
3. Click the search button, .

Transferred Calls

Transferred can be viewed in the assigned calls tab. Information on the transfer such as transfer date and time, custom ID, transferor, transferee, transfer type, initial queue, and last-agent-spoken-to can be viewed in the transferred calls list.

Accessing Transfer Details

1. Click the info button, , located in the detail column for the desired transfer. The following pop-up window will appear:



The screenshot shows a pop-up window titled 'Call Information' with a close button in the top right corner. The window has four tabs: 'Call Information' (selected), 'Call History', 'Transfer History', and 'Campaign Info'. Below the tabs is a table with the following data:

Active Call Key	ahRzfm11c3RlcmktaGl6bWV0bGVyaXlXcXlEQ2FsbBiAgLjIj8G9CQyiARlkZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
ID	ahRzfm11c3RlcmktaGl6bWV0bGVyaXlXcXlEQ2FsbBiAgLjIj8G9CQyiARlkZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
Tenant	demo.callcenterstudio.com
Date	2020-05-08 15:39:06
Caller ID	15125721095
Called Number	*****66
Queued	<input checked="" type="checkbox"/>
Queue	outbound



A 'Close' button is located at the bottom right of the window.

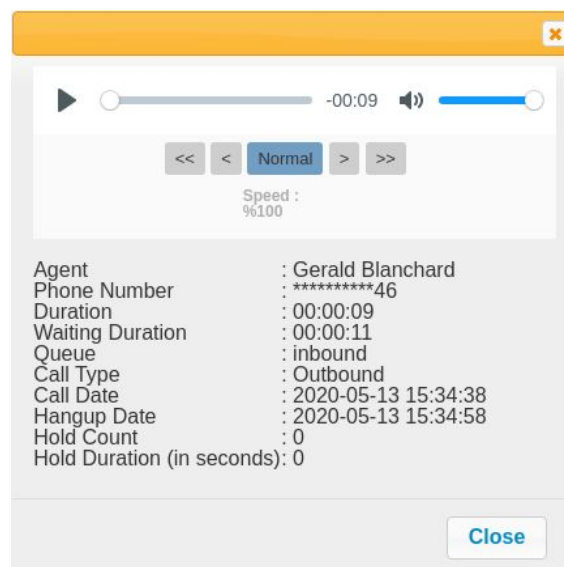
*Note: For more information on this pop-up window, see **Call Information**, **Call History**, **Transfer History**, and **Campaign Info Sections** found under **Accessing Call Details**.*

Downloading a Transferred Call Recording

1. Click the download button, , located to the right of the blacklist list column.

Listening to a Transferred Call Recording

1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:




2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:



Note: volume can be adjusted using the bar shown below:



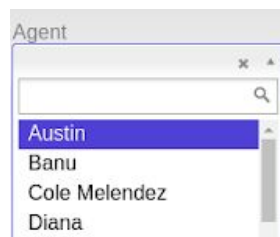
3. To exit the pop-up window, click the close button, .


Searching Transferred Calls

There are six ways to search for transferred calls, as shown below (more than one search feature can be used at the same time):

Agent

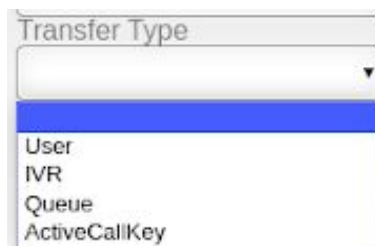
1. Click the agent input box. An example dropdown list is shown below:



2. Select the desired agent
3. Click the search button, .

Transfer Type

1. Click the transfer type input box. A dropdown list will appear. An example list is shown below:

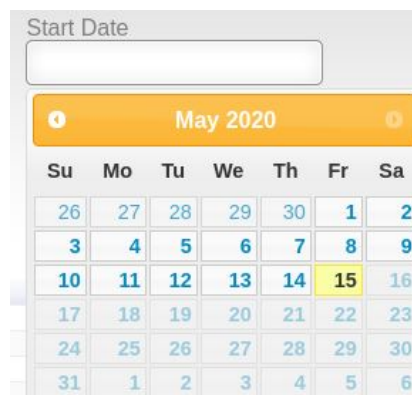


2. Select the desired transfer type.

3. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

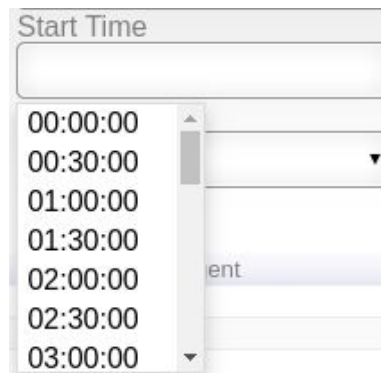


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input. The following dropdown list will appear:



A screenshot of the 'Start Time' dropdown menu. The menu is open, showing a list of time options from 00:00:00 to 03:00:00 in 30-minute increments. The input field above the menu is empty.

2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box, the following calendar pop-up window will appear:



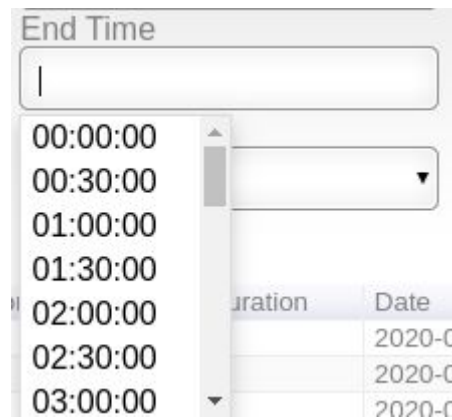
A screenshot of the 'End Date' calendar pop-up window. The window shows a calendar for May 2020. The date 15 is highlighted in yellow. The input field above the calendar is empty.

2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box, the following dropdown list will appear:

A screenshot of a software interface showing a dropdown menu for "End Time". The menu is open, displaying a list of time intervals from 00:00:00 to 03:00:00 in 30-minute increments. To the right of the time list, there is a table with two columns: "Duration" and "Date". The "Duration" column has a dropdown arrow, and the "Date" column shows the year "2020-C".

Duration	Date
	2020-C
	2020-C
	2020-C

2. Select the desired end time.

3. Click the search button,



Voicemail & Callback Request Calls

The Voicemail & Callback Request Screen is shown below:

Number <input type="text"/>	Start Date <input type="text"/>	End Date <input type="text"/>																		
Status <input type="text"/>	Start Time <input type="text"/>	End Time <input type="text"/>																		
<div>25 ▾</div> <table border="1"> <thead> <tr> <th>Caller ID</th> <th>Call Date</th> <th>Call Type</th> <th>Status</th> <th>Callback Date</th> <th>Callback User</th> <th>Callback Disposition</th> <th>Callback Recording</th> <th>Voicemail Recording</th> </tr> </thead> <tbody> <tr> <td>*****75</td> <td>2020-05-21 18:09:25</td> <td>VoiceMail</td> <td>VoiceMail</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Caller ID	Call Date	Call Type	Status	Callback Date	Callback User	Callback Disposition	Callback Recording	Voicemail Recording	*****75	2020-05-21 18:09:25	VoiceMail	VoiceMail					
Caller ID	Call Date	Call Type	Status	Callback Date	Callback User	Callback Disposition	Callback Recording	Voicemail Recording												
*****75	2020-05-21 18:09:25	VoiceMail	VoiceMail																	

Accessing Voicemail & Callback Request Details

1. Click the desired orange highlighted date located under the Call Date column. The following pop-up will appear:


Call Information
Call History
Transfer History
Campaign Info

Active Call Key	ahRzfm11c3RlcmktaGi6bWV0bGVyaXlXcxiKQWN0aXZlQ2FsbBiAgLiX14yUCgyiARikZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
ID	ahRzfm11c3RlcmktaGi6bWV0bGVyaXlXcxiEQ2FsbBiAgLi30dGCCwyiARikZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t
Tenant	demo.callcenterstudio.com
Date	2020-05-21 18:09:25
Caller ID	*****75
Called Number	15125721095
Queued	<input checked="" type="checkbox"/>
Queue	inbound



Close

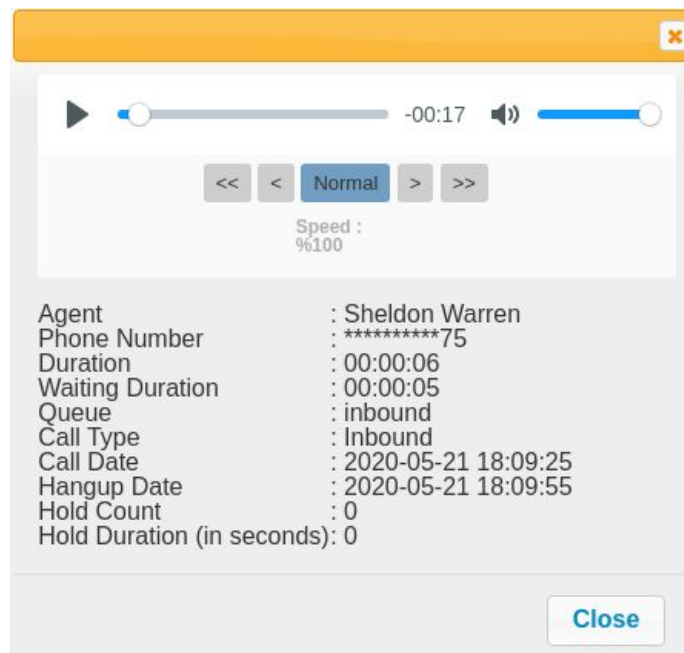
*Note: For more information on this pop-up window, see **Call Information**, **Call History**, **Transfer History**, and **Campaign Info Sections** found under **Accessing Call Details**.*

Downloading a Voicemail / Callback Request Recording

1. Click the download button, , located in the Voicemail recording column.

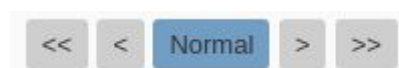
Listening to a Voicemail / Callback Request Recording

1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:




4. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:



Note: volume can be adjusted using the bar shown below:




5. To exit the pop-up window, click the close button, .

Searching Voicemail & Call Back Request Calls

There are six ways to search for voicemail & call back request calls, as shown below (more than one search feature can be used at the same time):

Number

1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

A text input box with the label "Number" above it. The box contains the text "15125721095".

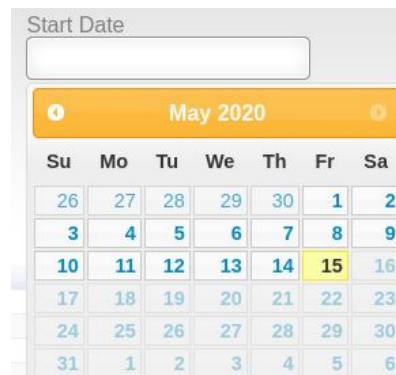
2. Click the search button, .

Status

Denotes the status of the call as “Voicemail.”

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:



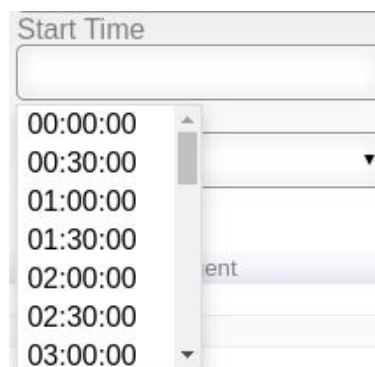
2. Click the desired start date.

3. Click the search button,



Start Time

1. Click the start time input box. The following dropdown list will appear:



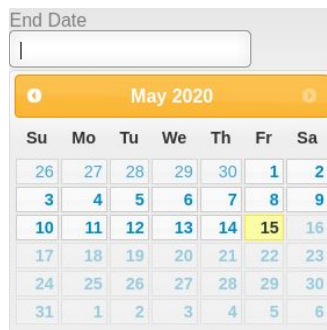
2. Select the desired start time.

3. Click the search button,



End Date

1. Click the end date input box, the following calendar pop-up window will appear:

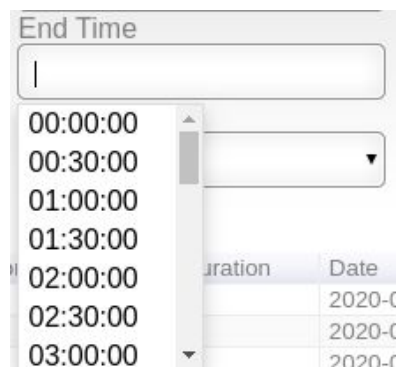


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:







2. Select the desired end time.


3. Click the search button,  .

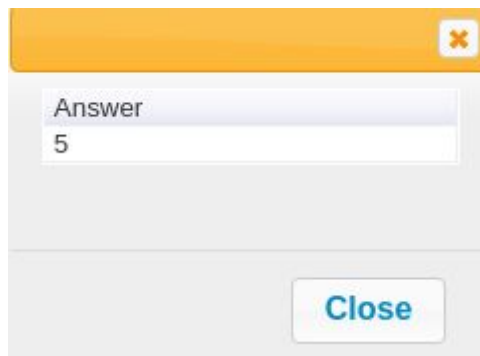
Satisfaction Survey

The Voicemail & Callback Request Screen is shown below:

Phone Number		Start Date	End Date	Report Options						
<input type="text"/>		<input type="text"/>	<input type="text"/>	 						
Agent	Queue	Call Date	Caller Number	Called Number	Talk Duration	Score	Answers	Status	#	
matthew.christina@callcenterstudio.com	inbound	2020-05-21 19:24:23	*****75	15125721095	00:00:08	5	Satisfaction Survey Question: 5	Partially Answered		
matthew.christina@callcenterstudio.com	inbound	2020-05-21 19:16:50	*****01	15125721095	00:00:11	5	Satisfaction Survey Question: 5	Partially Answered		

Viewing Satisfaction Survey Result

- Click the detail button, , the following pop-up window will appear an example result is shown below:




Answer

5

Close

Filtering Satisfaction Survey


- To filter the satisfaction surveys, write the preferred phone number or duration of the selection.
- After all the desired selections have been entered, click the filter button, , to see the filtered list.

Exporting Satisfaction Surveys

1. Filtered satisfaction surveys list can be exported in excel format by clicking on the,



, export button.

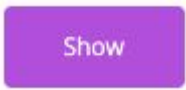


Note: using the records filter,  , up to a 100 call records can be shown on a single page in the Call Center Studio tenant.

Reporting



The reporting module is where reports about the calls, queues, users, campaigns, etc. of the client can be accessed. Through this module, reports can be filtered, viewed, and exported.

Functions of Keys in Reports:

		
<p>Button used to apply filtering on behalf of the agent, queue name, start and end times in the report.</p>	<p>Both of these buttons are used to export the report in .CSV format.</p>	<p>Button used to refresh the report table.</p>

Types of Reports:

- | | | |
|---------------|----------------------|------------------|
| 1. Queue | 6. Campaign | 9. Satisfaction |
| 2. Hunt Group | 7. Interactive Voice | Survey |
| 3. Agent | Response | 10. Integrations |
| 4. Call | 8. Reviews | 11. Platform |
| 5. Chat | | 12. Beta |

Queue Reports

Under this report title in the manual; *Queue Performance Daily*, *Queue Performance Daily Export*, *Queue Performance Hourly*, and *Chat Queue Performance* are included.

Queue Performance Daily

Call information about the selected queue on the specified dates is accessed here. If the queue is not selected, a report is received on all queues created on the tenant. Filtered report results can be downloaded in .CSV format.

Note: You cannot filter intervals longer than one month!

Queue

Inbound_Q +3

Start Date

08/04/2020

Finish Date

06/05/2020

Duration Unit


Second


Cumulative

Show

Queue	Date	Calls	Short Calls	Answered	Answer Rate ↓	Answered in SL
Total		3	1	2	66,67	1
Inbound_Q	2020-04-13	2	0	2	100,00	1
Inbound_Q	2020-04-22	1	1	0	0,00	0
Outbound_Q	2020-04-08	0	0	0	0,00	0
KarimSayani	2020-04-09	0	0	0	0,00	0
Outbound_Q	2020-04-09	0	0	0	0,00	0
Outbound_Q	2020-04-10	0	0	0	0,00	0

Queue Performance Daily Export

Call information about the selected queue on the specified dates is exported here. Filtered report results can be downloaded in .CSV format by clicking on the  download button.

Filtered report results can be deleted by clicking on the  delete button.


Queue ▾

Start Date



Finish Date

Duration Unit ▾

Export



You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
@callcenterstudio.com	QueuePerformanceReport_2020-02-01 00:00:00_2020-05-06 00:00:00	2020-05-06 11:05:41.097807	✓	 

Rows per page: 50 ▾ 1-1 of 1 < >

Queue Performance Hourly

Hourly call information and SL / SL2 / AR percentages related to the selected queue are accessed. Optionally, it can be downloaded in .CSV format.

report page

Queue: **Inbound** +1 Start Date: 04/02/2020 Finish Date: 06/05/2020 Start Time: Show


Date	Hour	Inbound	Answered	Short	Abandoned	SL	SL2	AR	Hold	ATT
	Total	42	22	10	20	86.363636363636	59.375	68.75	1	12.95
2020-03-04	12:00-13:00	6	2	0	4	100	33.333333333333	33.333333333333	0	1
2020-02-11	11:00-12:00	2	0	1	2	0	0	0	0	NaN
2020-02-21	17:00-18:00	2	0	2	2	0	0	0	0	NaN
2020-03-04	11:00-12:00	9	7	2	2	100	100	100	0	0.71
2020-03-04	13:00-14:00	3	1	0	2	0	0	33.333333333333	1	47
2020-03-04	14:00-15:00	3	1	2	2	0	0	100	0	43
2020-02-11	20:00-21:00	1	0	0	1	0	0	0	0	NaN
2020-02-21	15:00-16:00	1	0	0	1	0	0	0	0	NaN
2020-02-21	18:00-19:00	1	0	0	1	0	0	0	0	NaN
2020-02-25	18:00-19:00	1	0	1	1	0	0	0	0	NaN
2020-02-26	16:00-17:00	5	4	1	1	100	100	100	0	25
2020-04-22	13:00-14:00	1	0	1	1	0	0	0	0	NaN
2020-02-04	00:00-01:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	01:00-02:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	02:00-03:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	03:00-04:00	0	0	0	0	0	0	0	0	NaN

Rows per page: 50 1-50 of 2233

Chat Queue Performance

Chat performance information and answering percentages related to the selected queue are accessed here. It can be downloaded in .CSV format.

reports page

Queue  +1

Start Date
11/02/2020

Finish Date
06/05/2020

Show

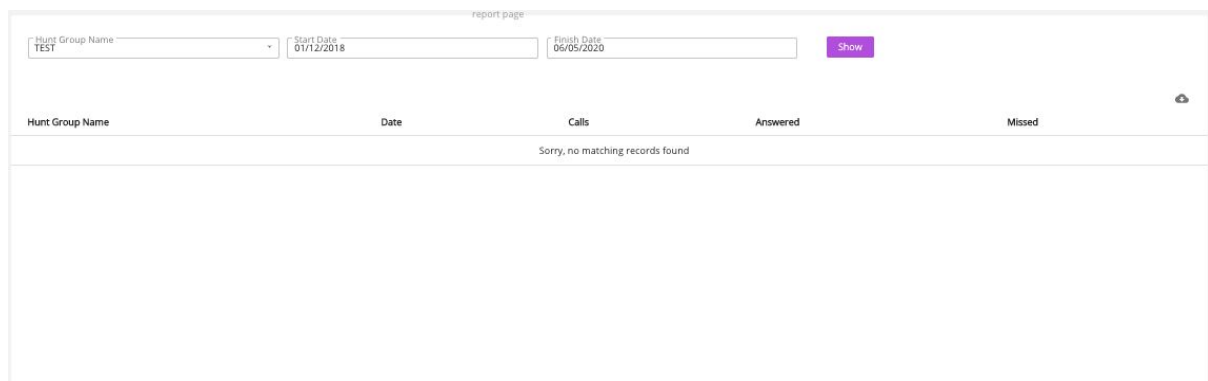
Queue report not found.

Queue	Date	Number of Chats	Answered Chats	Rejected Chats	Abandon	Answer Rate	Answer Speed	Answered in SL	SL	Total chatting	Average Chatting
Sorry, no matching records found											

Rows per page: 50 0-0 of 0

Hunt Group Reports

Call results of Ip Phone users included in Hunt groups are accessed. For the Hunt group, the report can be filtered by selecting the start and end time. It can be downloaded in .CSV format.

A screenshot of the "report page" for Hunt Group Reports. At the top, there are three input fields: "Hunt Group Name" with a dropdown menu showing "TEST", "Start Date" with "01/12/2018", and "Finish Date" with "06/05/2020". To the right of these fields is a purple "Show" button. Below the input fields is a table with the following headers: "Hunt Group Name", "Date", "Calls", "Answered", and "Missed". The table body contains a single row with the text "Sorry, no matching records found". A small cloud icon is visible in the top right corner of the table area.

Agent Reports

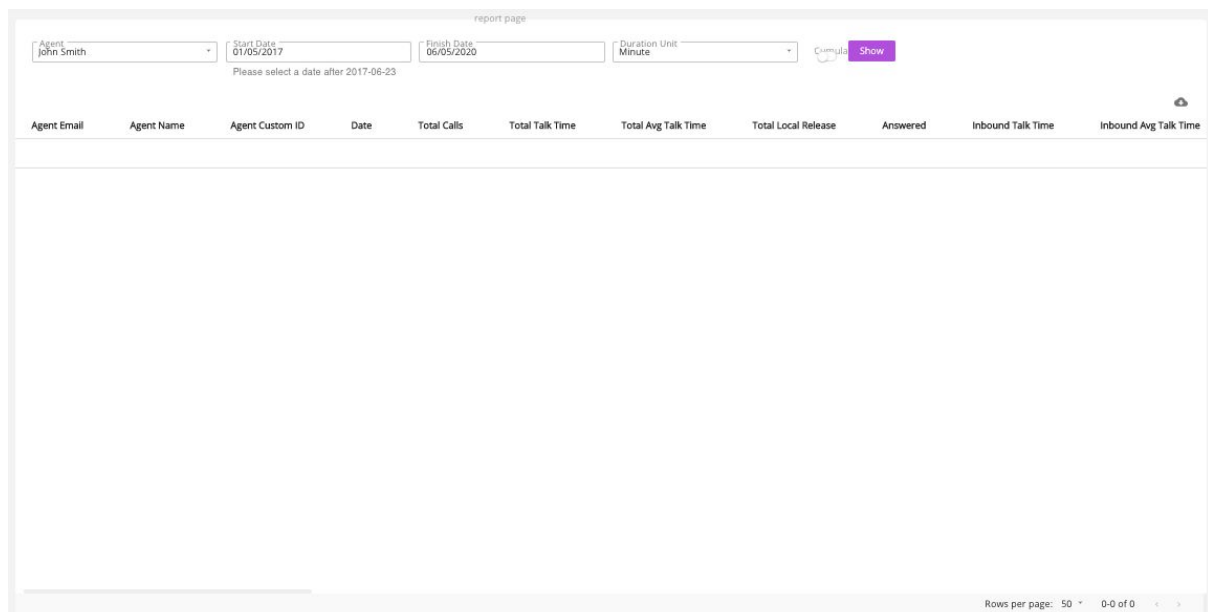
Reports under the title of Agent:

1. Agent Performance Report
2. Agent Performance By Queue
3. Team Performance
4. Agent Status Detail
5. Queue Membership

6. User List

Agent Performance Report

In the Agent Performance report, the performance report of the selected Agent can be accessed. Information such as how many answered calls or outgoing calls can be accessed here. It can be downloaded in .CSV format.

The image shows a web interface for generating an Agent Performance Report. At the top, there's a "report page" header. Below it, a form contains several input fields: "Agent" (a dropdown menu with "John Smith" selected), "Start Date" (a date picker showing "01/05/2017"), "Finish Date" (a date picker showing "06/05/2020"), and "Duration Unit" (a dropdown menu with "Minute" selected). A "Show" button is to the right of these fields. Below the form, a small text note says "Please select a date after 2017-06-23". The main area of the interface is a table with the following headers: "Agent Email", "Agent Name", "Agent Custom ID", "Date", "Total Calls", "Total Talk Time", "Total Avg Talk Time", "Total Local Release", "Answered", "Inbound Talk Time", and "Inbound Avg Talk Time". The table body is currently empty. At the bottom right, there's a footer that says "Rows per page: 50" and "0-0 of 0".

Topics in the Report:

Agent Email	Agent's email
Agent Name	Agent's name
Agent Custom Id	Agent's Custom Id
Date	The date the call arrived
Total Calls	Total number of incoming + outgoing calls
Total Talk Time	Total talking times of incoming + outgoing calls
Total Avg Talk Time	Total incoming + outgoing call average talk times
Total Local Release	Total number of calls terminated by the agent

Answered	Total number of calls answered by the agent
Inbound Talk Time	Total talking time of incoming calls
Inbound Avg Talk Time	Total of average talking times of incoming calls
Inbound Local Release	Sum of incoming calls terminated by the agent
Abandon Calls	Unanswered calls
Outbound Attempts	Total number of failed outgoing calls
Outbound Calls	Total number of outgoing calls
Outbound Talk Time	Total talking time of outgoing calls
Outbound Avg Talk Time	Total average talking times of outgoing calls
Outbound Local Release	Sum of outgoing calls terminated by the agent
Available	Total time that the agent remains in AVAILABLE status
Ringling	Total time that the agent remains in RINGING status
Dialing	Total time that the agent remains in DIALING status
Talking	Total time that the agent remains in TALKING status
Chat	Total time that the agent remains in CHAT status
After Call Work	Total time that the agent remains in ACW status

Wrap Up	Total time that the agent remains in WRAP UP status
Break	Total time that the agent remains in BREAK status
Lunch	Total time that the agent remains in LUNCH status
Meeting	Total time that the agent remains in MEETING status
Training	Total time that the agent remains in TRAINING status
Outbound	Total time that the agent remains in OUTBOUND status
Back Office	Total time that the agent remains in BACK OFFICE status
Total Duration	Sum of the time spent in statuses (including custom statuses)
Holds	The number of times the call is put on hold.
Hold Duration	Total time elapsed when the call was put on hold
First Login	Date/time when the agent entered the system for the first time during the day
Last Logout	Date/time when the agent exited the system for the last time during the day
Number of Logout	Total number of times the agent exited from the system during the day
Production	Under the Status tab in the Administrator section, when creating a status the “Productive” status can be checked. When checked, the time that the agent was in this status will be displayed here.

Break Lunch	Total time in break + lunch status
Other	Other information if available
Training Meeting	Total time in Training + Meeting statuses
Special Status	Total time in Special status
Answered Speed	The time that the Agent spent answering the call

Agent performance by queue

These are the reports that show the call details and agents' status regarding the queue of incoming and outgoing calls. The report can be filtered according to the agent and the date. Also, it can be downloaded in .CSV format.

Note: Descriptions of the fields in the report are the same as the Agent Performance report, only the Agent Special ID field is not added in this report, and the Queue field is added.

report page

Agent: Test
Queue:
Start Date: 01/01/2019
Finish Date: 06/05/2020
Show

Agent	Custom ID	Date	Queue	Total Calls	Total Talk Time	Total Avg Talk Time	Total Local Release	Inbound	Inbound Talk Time	Inbound Avg Talk Time	Inbound
Test		2020-04-03	KarimSayani	7	171,00	24,43	4	0	0,00	0,00	0
Test		2020-04-07		0	0,00	0,00	0	0	0,00	0,00	0
Test		2020-04-09	KarimSayani	2	279,00	139,50	3	0	0,00	0,00	0
Test		2020-04-10	Outbound_Q	1	43,00	43,00	4	0	0,00	0,00	0
Test		2020-04-10	KarimSayani	0	0,00	0,00	1	0	0,00	0,00	0
Test		2020-04-13		0	0,00	0,00	0	0	0,00	0,00	0
Total				10	493,00	49,30	12	0	0,00	0,00	0

Rows per page: 50 * 1-7 of 7

Team Performance Report

Call information of agents in a specific team, and status details of the agents in the team can be accessed. It can be downloaded in .CSV format, which can be filtered by team name and date.

Note: The descriptions of the fields in the report are the same as the Agent Performance report. The only difference is the Team name has been added to the report.

report page

Teams
gamze
Start Date
01/12/2018
Finish Date
06/05/2020
Duration Unit
Cumulo Show

O	Available	Ringing	Dialing	Talking	Chat	After Call Work	Wrap up	Break	Lunch	Meeting	Training	Outbound
	1791,00	0,00	0,00	0,00	0	0,00	0,00	0,00	0,00	0,00	0,00	0
	8128,00	0,00	0,00	0,00	0	7,00	0,00	10,00	5,00	0,00	8,00	0
	238,00	0,00	10,00	0,00	0	0,00	0,00	0,00	0,00	13,00	0,00	0
	10157,00	0,00	10,00	0,00	0	7,00	0,00	10,00	5,00	13,00	8,00	0

Agent Status Detail

Agent Status Detail reports the status of the agents, the time/date intervals they change their status, and the time they stay in a call status are displayed in detail here. Filtering can be done

according to the agent, team, or date. To view the report, it must be downloaded in .CSV format.

report page

Agent Team Start Date Finish Date Export

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:08:43.348381	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:08:27.566720	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:05:16.818142	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:04:59.349202	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:04:38.123920	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 12:00:15.679518	✓	
gamze.sanal@alo-tech.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:59:07.717536	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:54:01.576508	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:47:10.794912	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_	2019-12-25 11:46:57.012452	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:37:34.029031	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:32:47.711173	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:32:05.150064	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:31:16.769205	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:28:00.322659	✓	
gamze.sanal@callcenterstudio.com	AgentStatus_2019-12-23 00:00:00_2019-12-24 23:59:59	2019-12-25 11:26:47.388845	✓	

Rows per page: 50 1-24 of 24

An example of the report is shown below:

Agent	Statuses	Date	Duration
John Smith	available	26.11.2015 10:09	3

John Smith	aftercallwork	26.11.2015 10:09	2
John Smith	available	26.11.2015 10:09	25
John Smith	ringing	26.11.2015 10:09	4
John Smith	talking	26.11.2015 10:10	14
John Smith	wrapup	26.11.2015 10:10	6
John Smith	available	26.11.2015 10:10	15
Matt Christina	aftercallwork	26.11.2015 10:10	9
John Smith	available	26.11.2015 10:10	6
John Smith	ringing	26.11.2015 10:11	25
John Smith	talking	26.11.2015 10:11	9
John Smith	available	26.11.2015 10:11	2
John Smith	ringing	26.11.2015 10:11	7

Queue Membership

The included user information in queues, the current status of users, and the priority values of a queue can be seen here. If desired, the report can be downloaded in .CSV format.

report page

Queue: Outbound_Q [Show](#)

Agent Name	Agent Custom Id	Queue Name	Status	Last Status	Priority
Test		Outbound_Q	logoff	2020-04-13 14:59:39	100
Şefika Korkmaz		Outbound_Q	available	2020-04-15 14:45:53	100
Gökçe Karaduman		Outbound_Q	logoff	2019-11-25 15:45:16	100
Sinem Demirelek		Outbound_Q	logoff	2020-04-10 15:41:30	100
AA Test User		Outbound_Q	logoff	2019-11-01 12:06:37	100
Fatih Ç. Koç		Outbound_Q	lunch	2020-04-14 17:18:47	100
AA Test User2		Outbound_Q	logoff	2019-08-06 16:15:53	100
Umut Ç. Turhan		Outbound_Q	logoff	2020-05-05 16:53:09	100
Cemal Yılmaz		Outbound_Q	logoff	2020-05-04 17:36:41	100
Reda Amharrech		Outbound_Q	logoff	2020-04-30 22:00:17	100
Abdullah Kevser		Outbound_Q	logoff	2020-04-02 21:23:38	80

Rows per page: 50 1-11 of 11

User List

All users registered in the tenant and their authority status are listed. It can be downloaded in .CSV format.

report page

Show

Username	Name	Station Number	Custom ID	Admin	Agent	Team Leader	Reporting	Active
abdullah.kevser@callcenterstudio.com	Abdullah Kevser	859580		✓	✓	✓	✓	✓
cemal.yilmaz@callcenterstudio.com	Cemal Yilmaz	810520		✓	✓	✓	✓	✓
fatih.koc@callcenterstudio.com	Fatih Ç. Koç	323033		✓	✓	✓	✓	✓
gokce.karaduman@alo-tech.com	Gökçe Karaduman	869667		✓	✓	✓	✓	✓
matt.christina@callcenterstudio.com	Matthew Christina	546726		✓	✓	✓	✓	✓
mert.agacbicer@alo-tech.com	Mert Ağaçbicer	251465		✓	✓	✓	✓	✓
reda.amharech@callcenterstudio.com	Reda Amharech	103909		✓	✓	✓	✓	✓
sefika.korkmaz@alo-tech.com	Şefika Korkmaz	481744		✓	✓	✓	✓	✓
sinem.demirbilek@alo-tech.com	Sinem Demirbilek	None		✓	✓	✓	✓	✓
test.user2@callcenterstudio.com	AA Test User2	497223		✓	✓	✓	✓	✓
test.user@callcenterstudio.com	AA Test User	497320		✓	✓	✓	✓	✓
test@callcenterstudio.com	Test	483047		✓	✓	✓	✓	✓
umut.turhan@callcenterstudio.com	Umut Ç. Turhan	769497		✓	✓	✓	✓	✓




Rows per page: 50 1-13 of 13

Call Reports

Reports under the title of Call:

1. Call Detail
2. Call Transfer
3. General Call Traffic
4. Abandoned Calls from Queues
5. Voicemail & Callback Request Calls

Call Detail Report

1. The report includes detailed information on all calls. Filtering can be done according to queue, Agent name, Start, and End time.
2. If voice recordings are requested to appear in the report,  option should be selected.
3. It is optional to name the report, and the report can be downloaded in an .CSV format without any name. Filtered report results can be downloaded in .CSV format by clicking on the, , download button. Filtered report results can be deleted by clicking on the, , delete button.

Topics in the Report explained in the Manual:

Call ID	The ID of the call
Call Unique ID	Unique ID of the call
Channel	The channel from which the call came and exited
Queued	If the call took place in a queue, “1” will be displayed. If the call did not take place in the queue, “0” will be displayed.
Answered	If the call is answered, “1” will be displayed. If the call was not answered, “0” will be displayed.
Answered By	Agent who answered the call.
Assigned	If the call was assigned to an agent, “1” will be displayed. If the call was not assigned to an agent, “0” will be displayed.
Abandoned	If the call was abandoned, “1” will be displayed. If the call was not abandoned, “0” will be displayed.
Dequeue	-
Call Date	The date and time when the call entered the system.
Queue Date	The date and time when the call was queued.
Connection Date	The date and time when the call was connected to the customer representative.
Hang Up Date	The date and time when the call was closed.
Wait Duration	The wait duration the call
Call Duration	The duration of the call
Hold	The number of times the call was placed on hold
Hold Duration	The length of time that the call was on hold

Service Level	<p>If the call was answered within the service level, “1” will be displayed.</p> <p>If the call was not answered within the service level “0” will be displayed.</p>
Short Call	<p>If the call was closed within the short call duration set time, “1” will be displayed.</p> <p>If the call was not closed within the short call duration set time, “0” will be displayed.</p>
Caller ID	Phone number of the caller
Called Number	The phone number of the person called
Call Direction	<p>The incoming call is called “Inbound,”</p> <p>The outgoing call is specified as “Outbound.”</p>
Queue	Indicates which queue the incoming or outgoing call came or exited from.
Agent	Agent’s name
Agent Custom Id	Agent’s Custom Id
Local Release	<p>If the agent closed the call "1" will be displayed.</p> <p>If the customer closed, the call “0” will be displayed.</p>
Voice Recording	<p>If there is a voice recording for the call, "1" will be displayed.</p> <p>If the voice recording is not logged or if it is not present, "0" will be displayed.</p>
Custom Variables	Call variables defined in the IVR
Source Tenant	Tenant's detailed report of the call
ACD Date	The delivery date of the call
ACD First Queue	Queue where the call was first sent.
Last Attendant Step	The menu step where the call was ended.
Tags	Tags assigned to the call

Transfer Tenant	Tenant sending the call by internal transfer or virtual number
Transfer Tenant Agent	The agent who made the transfer.
Disposition	Automatic result codes are written about the status of the call (Chanunavail, cancel, answer, busy)
IVR Elapsed Time	Total time in IVR

Call Transfer

Information regarding transfers can be found here. It can be filtered using the agent and transfer type. Filtered report results can be downloaded in .CSV format by clicking on the



download button. Filtered report results can be deleted by clicking on the



delete

button.

Active Call Key	The key number of the call
Transfer Date	Date of the transferred call
Custom ID	Agent's Custom ID
Transferor	The transferor of the call
Transferee	The transferee of the call
Transfer Type	Type of the Transfer
Initial Queue	The initial call queue
Last Agent	Last agent on the call

General Call Traffic

The information of the Executive Summary Report sent to the users according to the Daily, Weekly, and Monthly options are available via email. (Identification is made from User Notification Settings.)

Start Date
2018/07/02

Finish Date
2020/05/08


Show


Date	Incoming Calls	Answered Incoming Calls	Incoming Call Duration	Missed Calls	Outgoing Attempts	Outgoing Calls
2020-01-27	2	1	102	1	81	48
2020-01-21	7	0	41	1	49	29
2020-01-30	1	1	23	0	36	25
2020-02-03	0	0	0	0	31	19
2020-01-20	0	0	0	0	38	30
2020-04-22	1	0	6	1	12	3
2020-01-29	1	0	3	1	27	19
2020-02-04	0	0	0	0	33	22
2020-01-23	3	0	5	1	27	15
2020-02-06	3	0	2	0	36	21
2019-12-19	15	0	1173	2	17	9

Rows per page: 50

1-50 of 276

Abandoned Calls from Queues

Lists of abandoned calls in queues are displayed in detail here. Filtering can be done by number and queue. To view the report, it must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the  download button.

Filtered report results can be deleted by clicking on the  delete button.

My Reports ☐ [Export](#) [Refresh](#)

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	abandon_calls_2019-01-01 00:00:00_2020-05-08 23:59:59	2020-05-08 12:01:05.670595	✓	Download Delete



Rows per page: 50 1-1 of 1 < >





Voicemail & Callback Request Calls

Lists the calls that arise from requests of voicemails or callbacks are displayed in detail here.



Filtering can be done by number and status. To view the report, it must be downloaded in

.CSV format. Filtered report results can be downloaded in .CSV format by clicking on the

 download button. Filtered report results can be deleted by clicking on the  delete button.

Number	Status Voice Mail	Start Date 09/04/2019	Finish Date 08/05/2020	My Reports	Export	
You can find the previously prepared reports in the list below.						
Report Creator	File Name	Date Created	Completed	Download		
fatih.koc@callcenterstudio.com	callback_request_2019-04-09 00:00:00_2020-05-08 23:59:59	2020-05-08 13:17:55.585929	✓			
fatih.koc@callcenterstudio.com	callback_request_2018-01-01 00:00:00_2020-05-08 23:59:59	2020-05-08 12:00:44.216074	✓			
Rows per page: 50 1-2 of 2 < >						

Chat Reports

To view the details, they must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the  download button. Filtered report results can be deleted by clicking on the  delete button.

Chat Details Report

Example of the report is shown below:

Queue

Agent

Start Date





Finish Date

Parking Date

My Reports

Export

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
sophie@callcenter.com	ChatDetail_2019-03-04 00:00:00_2019-07-16 23:59:59	2019-07-17 02:41:04.184876	✓	 
sophie@callcenter.com	ChatDetail_2019-07-17 00:00:00_2019-07-17 23:59:59	2019-07-17 02:40:32.172746	✓	 

Queue

Agent

Start Date



Finish Date

Parking Date

My Reports

Export

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	ChatDetail_2017-10-02 00:00:00_2020-05-08 23:59:59	2020-05-08 13:33:17.621656	✓	 

Rows per page: 50

1-1 of 1

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Campaign Reports

Reports under the title of Campaign:











1. Call History
2. Finish Codes
3. Last Finish Code

Call History

Reports show campaign searches, call information, custom fields, notes, planned visit dates (redial date), and scripster results. It can be filtered by the Start-End Date, -loaded list (data), Agent, and campaign name. The report must be downloaded in .CSV format to be displayed.

Filtered report results can be downloaded in .CSV format by clicking on the  download

button. Filtered report results can be deleted by clicking on the  delete button.

Campaign UK test	List uk test 1	Start Date 01/05/2019	Finish Date 08/05/2020	Export	
You can find the previously prepared reports in the list below:					
Report Creator	File Name	Date Created	Completed	Download	
fatih.koc@callcenterstudio.com	CampaignCallHistory_2019-05-01 00:00:00_2020-05-08 23:59:59	2020-05-08 13:41:38.560487	✓		
fatih.koc@callcenterstudio.com	LastReasonCode_2013-09-01 00:00:00_2020-03-30 23:59:59	2020-03-30 14:01:13.344996	✓		
fatih.koc@callcenterstudio.com	LastReasonCode_2018-08-26 00:00:00_2020-03-30 23:59:59	2020-03-30 14:00:33.616270	✓		
fatih.koc@callcenterstudio.com	CampaignCallHistory_2019-06-30 00:00:00_2020-03-30 23:59:59	2020-03-30 13:39:10.799212	✓		
fatih.koc@callcenterstudio.com	CampaignCallHistory_2020-03-01 00:00:00_2020-03-30 23:59:59	2020-03-30 13:33:04.719130	✓		
Rows per page: 50 1-5 of 5 < >					

Finish Codes

Reports the numbers of the cause-effect codes and result codes of the campaign collectively.

The report can be downloaded in .CSV format.

Campaign

Start Date
01/01/2016

Finish Date
08/05/2020

Show

Campaign	Reason Code	Finish Code	Count
Sorry, no matching records found			

Rows per page: 50 0-0 of 0 < >

Last Finish Code

The result code of a number called in the campaign is written in this report. In this report, information such as contact information of the number called, other numbers, and the number of appointments, if the visit was created, can be accessed.

Campaign











List

Start Date

Finish Date

Export

You can find the previously prepared reports in the list below.

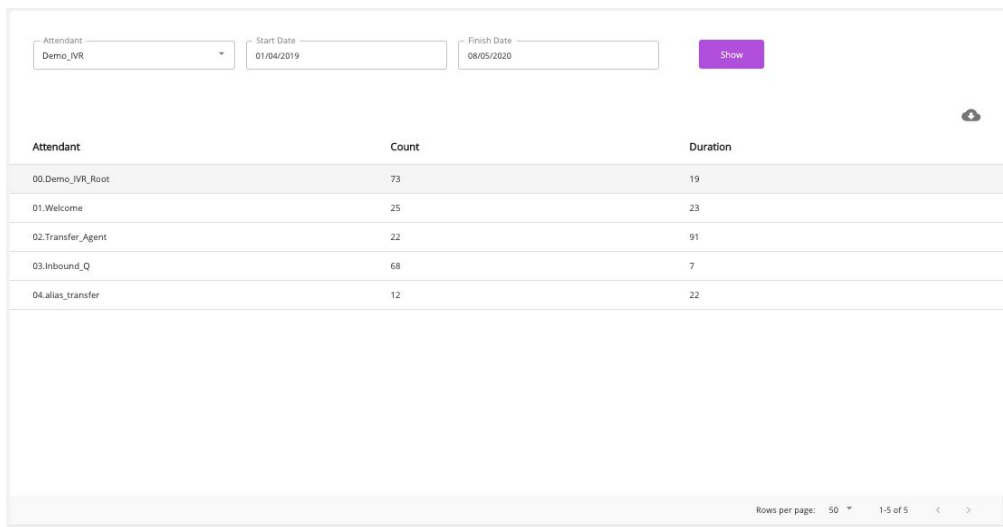
Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	CampaignCallHistory__2019-05-01 00:00:00_2020-05-08 23:59:59	2020-05-08 13:41:38.560487	✓	 
fatih.koc@callcenterstudio.com	LastReasonCode__2013-09-01 00:00:00_2020-03-30 23:59:59	2020-03-30 14:01:13.344996	✓	 
fatih.koc@callcenterstudio.com	LastReasonCode__2018-08-26 00:00:00_2020-03-30 23:59:59	2020-03-30 14:00:33.616270	✓	 
fatih.koc@callcenterstudio.com	CampaignCallHistory__2019-06-30 00:00:00_2020-03-30 23:59:59	2020-03-30 13:39:10.799212	✓	 
fatih.koc@callcenterstudio.com	CampaignCallHistory__2020-03-01 00:00:00_2020-03-30 23:59:59	2020-03-30 13:33:04.719130	✓	 

Rows per page: 50 1-5 of 5 < >

Interactive Voice Response Reports

Routing Performance

The Routing Performances in the Welcome menu can be accessed here. These are the reports that have the “Log” option selected when creating IVR steps. It is also the reports of how often IVR steps are taken between the chosen dates and the total waiting times in the steps.



The screenshot shows a web interface for the Routing Performance report. At the top, there are three input fields: 'Attendant' with a dropdown menu showing 'Demo_IVR', 'Start Date' with '01/04/2019', and 'Finish Date' with '08/05/2020'. To the right of these fields is a purple 'Show' button. Below the filters is a table with three columns: 'Attendant', 'Count', and 'Duration'. The table contains five rows of data. At the bottom right of the table area, there is a pagination control showing 'Rows per page: 50' and '1-5 of 5'.

Attendant	Count	Duration
00.Demo_IVR_Root	73	19
01.Welcome	25	23
02.Transfer_Agent	22	91
03.Inbound_Q	68	7
04.alias_transfer	12	22

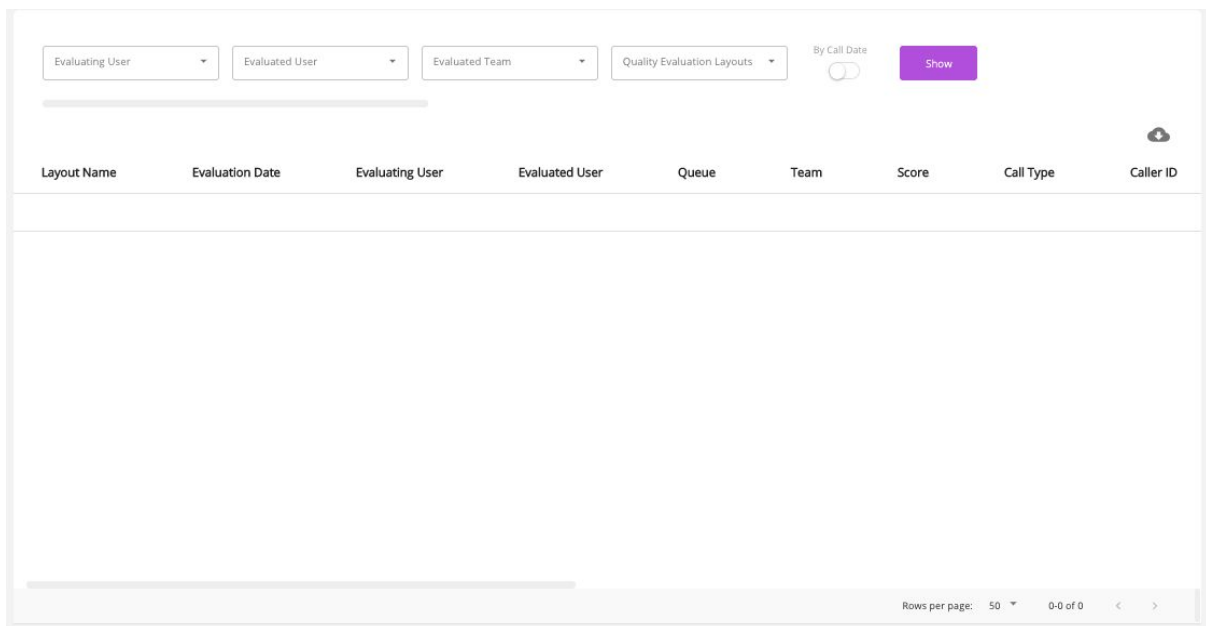
Review

Reports under the title of Review:

1. Evaluation Summary
2. Evaluation Summary Export
3. Evaluation Detail Export


Evaluation Summary

Agents' calls are evaluated using quality evaluation forms. Evaluation results can be found in this report. It can be filtered by agents, team leaders, and dates. It can be downloaded in .CSV format.

The screenshot shows a web interface for a quality evaluation report. At the top, there are four dropdown menus: "Evaluating User", "Evaluated User", "Evaluated Team", and "Quality Evaluation Layouts". To the right of these is a "By Call Date" toggle switch and a purple "Show" button. Below the filters is a table with the following headers: "Layout Name", "Evaluation Date", "Evaluating User", "Evaluated User", "Queue", "Team", "Score", "Call Type", and "Caller ID". The table body is currently empty. At the bottom right, there is a pagination bar showing "Rows per page: 50", "0-0 of 0", and navigation arrows.

Evaluation Summary Export

Evaluation Summary is exported here. Filtered report results can be downloaded in .CSV

format by clicking on the  download button. Filtered report results can be deleted by

clicking on the  delete button.

Evaluating User

Evaluated User



Quality Evaluation Layouts

Caller

With Voice



Export

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	QualityEvaluationReport_	2020-05-08 14:08:20.973717	✓	 

Rows per page: 50 1-1 of 1 < >

Evaluation Detail Export

Lists of evaluations are displayed in detail here. To view the report, it must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the  download button. Filtered report results can be deleted by clicking on the  delete button.

Evaluating User

Evaluated User

Queue

Quality Evaluation Layouts

With Voice

Export

You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	QualityEvaluationFormDetail__	2020-05-12 13:30:48.065303	✓	<div><div></div><div></div></div>



Rows per page: 501-1 of 1<>

Satisfaction Survey Reports

These are the reports that reach the keying values made by the customers, in response to the satisfaction survey questions defined in the IVR. Reports can be filtered according to start/finish date, phone number, campaign, being inbound or not, and downloaded in .CSV format.

☐ Only Inbound ☐ My Reports

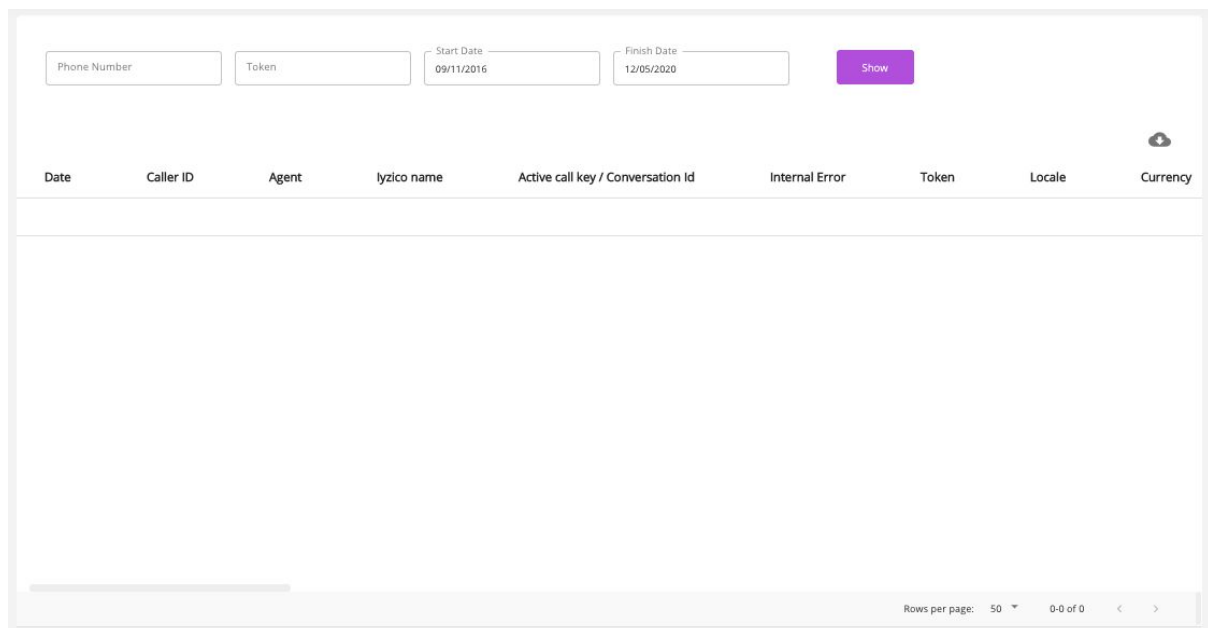
You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	SurveyDetail_2017-08-08 00:00:00_2020-05-12 23:59:59	2020-05-12 13:33:24.967170	✓	 

Rows per page: 50 1-1 of 1

Integrations

In this section, there are headings in which connections of different services that the system is integrated can be used. Regarding these integrations, the guidance of the assigned Call Center Studio project manager should be consulted regarding the installation and use.

A screenshot of the Call Center Studio Reporting interface. At the top, there are four input fields: "Phone Number", "Token", "Start Date" (with the value "09/11/2016"), and "Finish Date" (with the value "12/05/2020"). To the right of these fields is a purple "Show" button. Below the input fields is a table with the following headers: "Date", "Caller ID", "Agent", "lyzico name", "Active call key / Conversation Id", "Internal Error", "Token", "Locale", and "Currency". The table body is currently empty. At the bottom right of the interface, there is a pagination control showing "Rows per page: 50" and "0-0 of 0".

Platform













All users

All users registered in Tenant regarding related reports are listed here. It can be downloaded in .CSV format.

My Report

Export

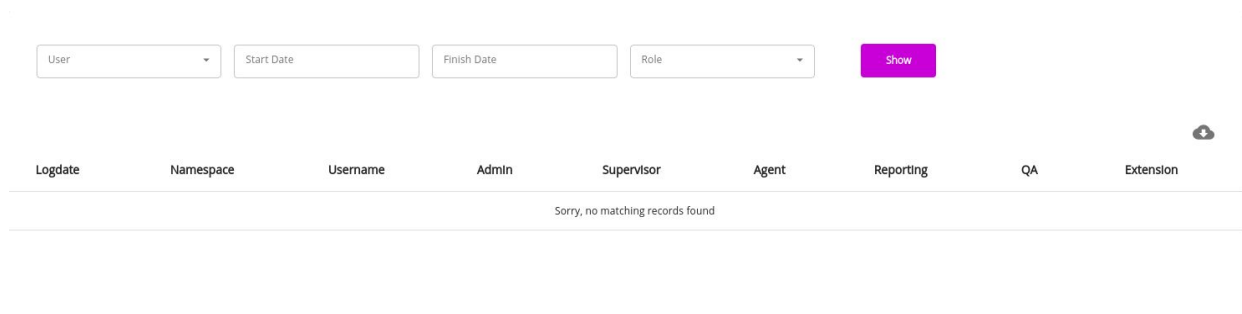
You can find the previously prepared reports in the list below.

Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	UserList_Test_2020-05-12_15-26-59	2020-05-12 15:26:59.950438	✓	 
simay.guler@alo-tech.com	UserList_2019-12-30_11-23-07	2019-12-30 11:23:07.256086	✓	 
gokce.karaduman@hotmail.com	UserList_2019-05-16_12-33-04	2019-05-16 12:33:04.211568	✓	 
mesut.oner@alo-tech.com	UserList_2018-07-17_10-36-08	2018-07-17 10:36:08.125020	✓	 
gokce.karaduman@alo-tech.com	UserList_2017-11-06_11-01-05	2017-11-06 11:01:05.652490	✓	 
gokce.karaduman@alo-tech.com	UserList_tesgt_2017-11-06_11-00-13	2017-11-06 11:00:13.555690	✓	 

Rows per page: 50 1-6 of 6

Daily User Status

All users who become active on the specified dates are accessed here. It is possible to filter the results based on the type of roles of users. Filtered report results can be downloaded in .CSV format optionally.

The interface for the Daily User Status report. It features a search bar with four input fields: "User", "Start Date", "Finish Date", and "Role", each with a dropdown arrow. To the right of these fields is a purple "Show" button. Below the search bar is a table with the following headers: "Logdate", "Namespace", "Username", "Admin", "Supervisor", "Agent", "Reporting", "QA", and "Extension". A small download icon is located to the right of the "Extension" header. Below the table headers, a message states "Sorry, no matching records found".

Logdate	Namespace	Username	Admin	Supervisor	Agent	Reporting	QA	Extension
Sorry, no matching records found								

Billing Summary

All users' billing summaries on the specified dates are shown here. It can also be downloaded in .CSV format optionally.

Start Date
02/09/2019

Finish Date
12/05/2020

Show

User Name	Agent	Extension ↓
Total	1690	46
karimsayani40@gmail.com	3	29
cemal.yilmaz@callcenterstudio.com	173	13
umut.turhan@callcenterstudio.com	189	4
helin.yildiz@callcenterstudio.com	147	0
test.user2@callcenterstudio.com	253	0
gamze.sanal@callcenterstudio.com	102	0
john.smith@emailaddress.com	0	0
karim.sayani@callcenterstudio.com	7	0
abdullah.kevser@callcenterstudio.com	172	0

Rows per page: 50 1-17 of 17 < >

Beta

Sections that are actively being edited appear here. For example, if a new user is being created it will appear here. This section is used normally by the Call Center Studio Development Team or Assigned Project Manager.

Queue Performance

Beta versions of the reports regarding queue's performances, which are not completed yet, can be seen here. It can be filtered by duration as 15 minutes, 30 minutes, and hourly. It can also be downloaded in .CSV format optionally.

<div> <div>Queue Emre Demir_ISIMLI_KUYRUK</div> <div>Start Date 02/07/2018</div> <div>Finish Date 12/05/2020</div> <div>Duration Unit 30 Minutes</div> <div>Show</div> </div>									
Time	Inbound	Answered	Short	Abandon	SL	SL2	AR	Hold	ATT
Total	215	127	44	88	89.76377952755905	66.66666666666666	74.26900584795322	21	55.42
18:00	16	4	10	12	75	50	66	0	16.75
14:00	23	12	5	11	91.66666666666666	61.11111111111111	66	7	128.25
11:00	25	15	2	10	80	52.17391304347826	65	8	15.93
09:30	8	0	5	8	0	0	0	0	NaN
11:30	14	6	5	8	83.33333333333334	55.55555555555556	66	2	59
16:00	17	9	3	8	66.66666666666666	42.85714285714285	64	0	80.22
10:30	12	6	2	6	83.33333333333334	50	60	3	34
14:30	16	10	1	6	100	66.66666666666666	66	1	43
16:30	27	21	4	6	90.47619047619048	82.6086956521739	91	0	40.86
09:00	3	0	2	3	0	0	0	0	NaN
13:30	7	5	0	2	100	71.42857142857143	71	0	64.4
<div>Rows per page: 50 1-49 of 49</div>									

Rejected Calls on Queue

Beta versions of the reports regarding rejected calls on queues that are not completed can be seen here. It can be filtered by duration as 15 minutes, 30 minutes, and hourly. It can also be downloaded in .CSV format optionally.

Agent
Emre Demir

Start Date
01/05/2019

Finish Date
12/05/2020

Show

Active Call Key

Caller ID

Called Number

Call Date

Reject Date

User Name

Agent Name

Queue Key

XN0ZXjpaGibbWV0bGVya55jb20	05358316162	908505326011	2019-05-09 09:44:55	2019-05-09 09:45:50	emretest@alo-tech.com	Emre Demir	ahRzfM11c3RlcmktaGibbWV0bGVyaXISCxIFUXVldWUYgiCA0cKk
XN0ZXjpaGibbWV0bGVya55jb20	05358316162	908505326011	2019-05-09 09:44:55	2019-05-09 09:45:39	emretest@alo-tech.com	Emre Demir	ahRzfM11c3RlcmktaGibbWV0bGVyaXISCxIFUXVldWUYgiCA0cKk
0N0ZXjpaGibbWV0bGVya55jb20	05071220265	908505326011	2019-05-09 09:52:59	2019-05-09 09:54:22	emretest@alo-tech.com	Emre Demir	ahRzfM11c3RlcmktaGibbWV0bGVyaXISCxIFUXVldWUYgiCA0cKk

Rows per page: 50

1-3 of 3

Supervisor



The supervisor screen provides the necessary tools to manage the entire operation.

Automatic Refresh

The automatic refresh button is located on the top of the supervisor screen. When Auto Refresh is “On” updates will be refreshed in real-time.

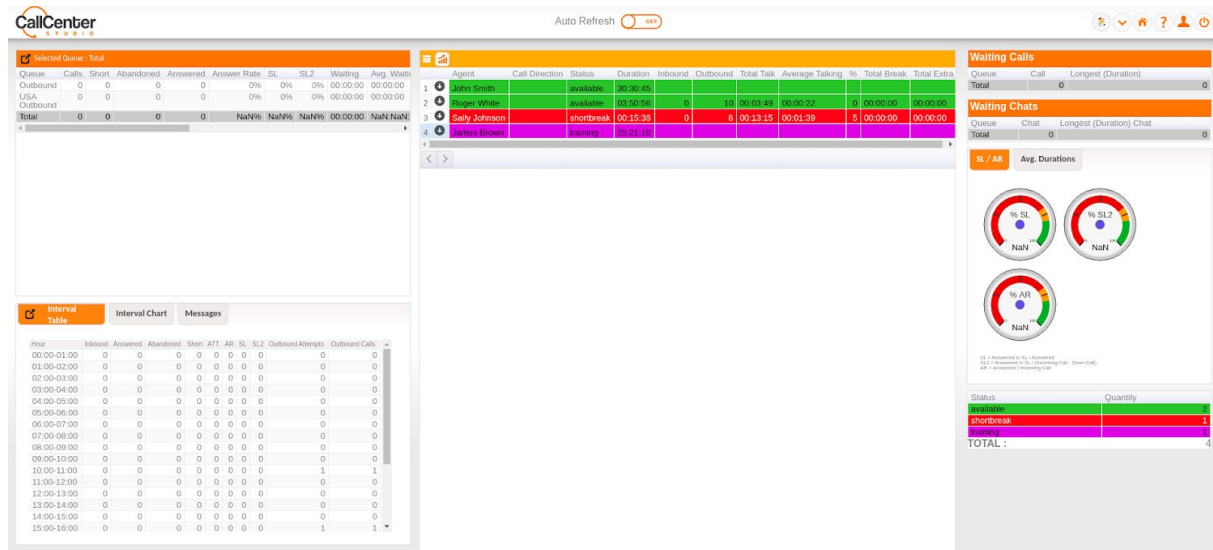


Auto Refresh can be turned off by clicking the refresh button. As shown below:



Agent Default Screen

The agent default screen is the first screen that appears when the Supervisor tab is clicked from this screen; multiple contact center matrixes are provided.




Queue Performance Table

Located in the top left-hand corner of the supervisor default screen is the Queue Performance table, as shown below:

Selected Queue : Total										
Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting	
inbound	9	5	0	4	44%	100%	100%	00:00:16	00:00:04	
Total	9	5	0	4	44%	100%	100%	00:00:16	00:00:01	

This table provides queue metrics based on individual queues. Multiple queues can be compared at a glance, and decisions can be made based on the information provided. Number of calls, number of short calls, number of abandoned calls, number of answer calls, the answer rate, service level, waiting time and average waiting time, outbound attempts, talk times, and chat details are provided.

Also, when the expand button, , is clicked. The table above will appear in a pop-up window format, as shown below:

Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting	Talk	Avg. Talk	Release	Out
outbound	0	0	0	0	0%	0%	0%	00:00:00	00:00:00	00:00:00	00:00:00	0	
inbound	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	
Total	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	

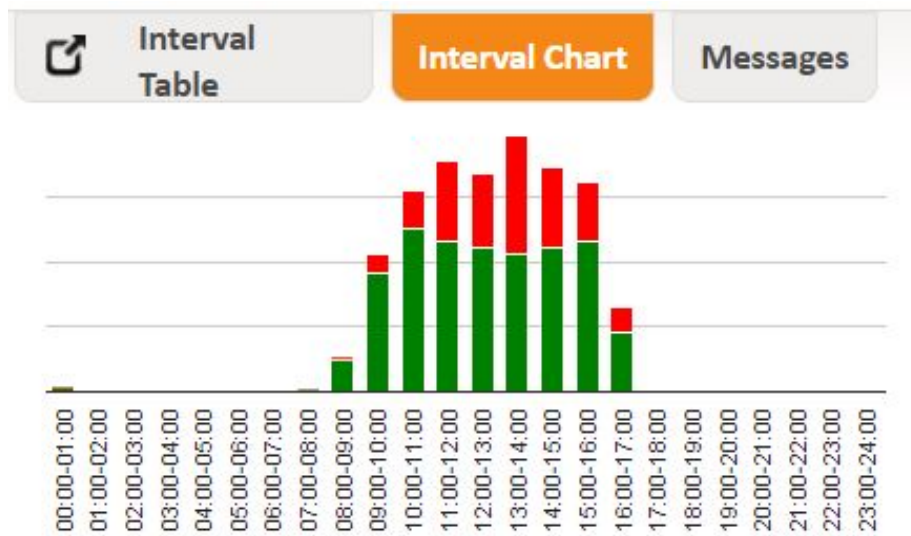
Interval Table

Information such as calls per hour, answered calls, and service level can be viewed here. It is possible to view total values and hourly values by selecting individual hour lines.

Interval Table											
Interval Chart											
Messages											
Hour	Inbound	Answered	Abandoned	Short	ATT	AR	SL	SL2	Outbound Attempts	Outbound Calls	
00:00-01:00	0	0	0	0	0	0	0	0	0	0	0
01:00-02:00	0	0	0	0	0	0	0	0	0	0	0
02:00-03:00	0	0	0	0	0	0	0	0	0	0	0
03:00-04:00	0	0	0	0	0	0	0	0	0	0	0
04:00-05:00	0	0	0	0	0	0	0	0	0	0	0
05:00-06:00	0	0	0	0	0	0	0	0	0	0	0
06:00-07:00	0	0	0	0	0	0	0	0	0	0	0
07:00-08:00	0	0	0	0	0	0	0	0	0	0	0
08:00-09:00	0	0	0	0	0	0	0	0	0	0	0

Interval Chart

Inbound calls are expressed with graphics. Green columns indicate answered calls, and red columns show missed calls.

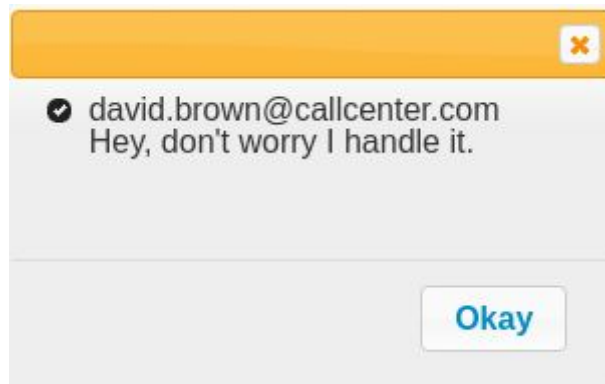


Messages

Previous messages from agents assigned to the supervisor can be viewed here.

Interval Table	Interval Chart	Messages
Type	Date	Message
supervisor	13/5/2020 15:8:33	Sender:Cole Melendez Good Job!
supervisor	13/5/2020 15:9:18	Sender:Cole Melendez Do you need help?
supervisor	13/5/2020 15:9:44	Sender:Cole Melendez Do you need help?

Incoming messages from an agent will pop-up in the middle of the supervisor screen, as shown below:




Click the Okay button, , to return to the supervisor screen.

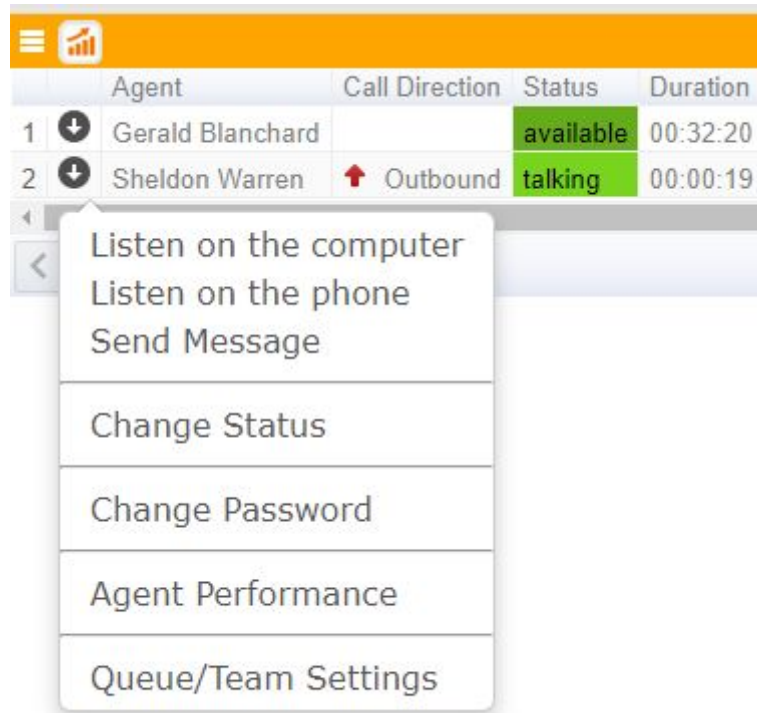
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details such as length of status duration, inbound, and outbound call totals are provided here. Also, using this list, agents can be messaged, their status can be changed along with their password, individual performance can be viewed, and queue or team modifications for each agent can be made.

	Agent	Call Direction	Status	Duration	Inbound	Outbound	Total Talk	Average Talking	%	Total Break	Total Ex
1	Keyon Sweeney		chatting (1)	00:00:12	0	0	00:00:00	00:00:00	0	00:09:07	00:02:4
2	Harold Kirk		available	00:14:06	2	0	00:01:31	00:00:45	5	00:00:00	00:12:3
3	John Smith		available	00:14:04	2	0	00:01:39	00:00:49	4	00:09:13	00:03:1
4	Vincent Warner		available	00:14:04	1	4	00:08:38	00:01:43	21	00:00:17	00:09:0
5	Jared Walter		available	00:14:02	1	0	00:00:31	00:00:31	1	00:00:22	00:11:3
6	Paul Baker		available	00:13:33	1	0	00:00:37	00:00:37	2	00:00:00	00:05:4
7	Gerald Blanchard		available	00:13:18	0	0	00:00:00	00:00:00	0	00:00:00	00:13:1
8	Cole Melendez		available	00:00:58	0	6	00:05:03	00:00:50	8	00:00:20	00:10:3
9	Khloe Bond		available	00:00:42	1	3	00:03:49	00:00:57	6	00:00:31	00:12:5

Listening to an Agent's Phone Call

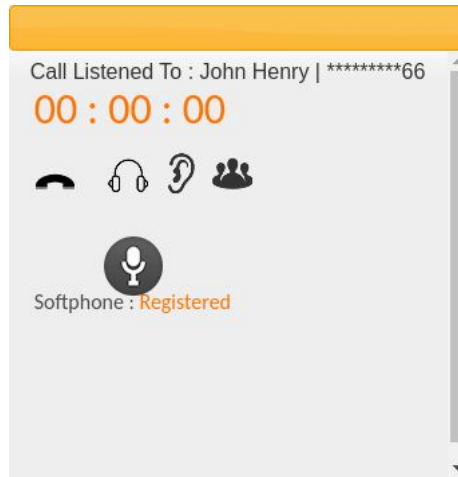
1. Click the  button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:







Note: the following options are only available when the agent is in “Talking” status:


- *Listen on the computer*
- *Listen on the phone*

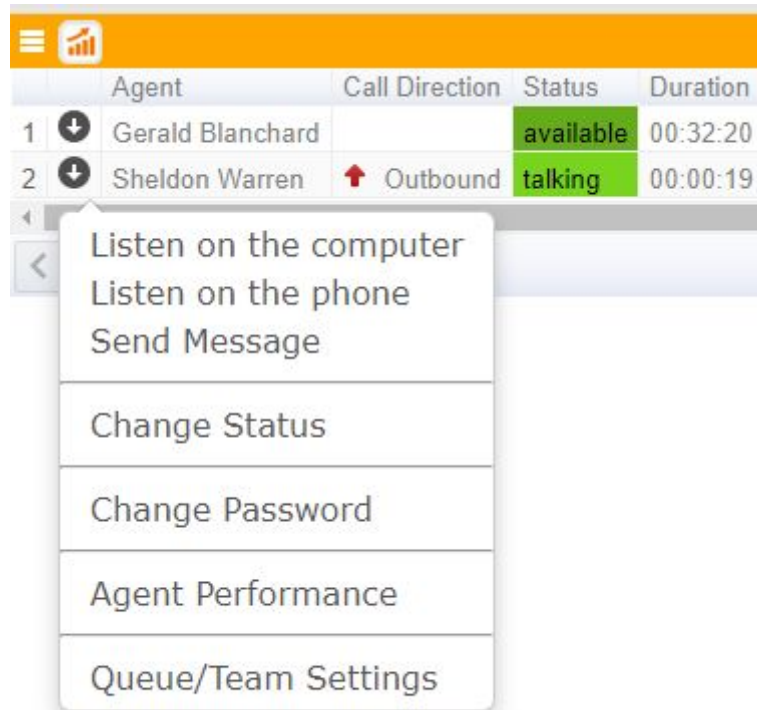
2. Click either “Listen on the computer” button or “Listen on the phone” button (If the supervisor has IP phone enabled), the following pop-up window will appear:



3. Click the "Listen" button,  .
 - Click the "Whisper" button,  . To support the agent, without joining the call.
 - Click the "Conference" button,  . To support the agent, by joining the call.
4. Click the "Hangup" button,  . To leave the call.

Sending a Message to an Agent

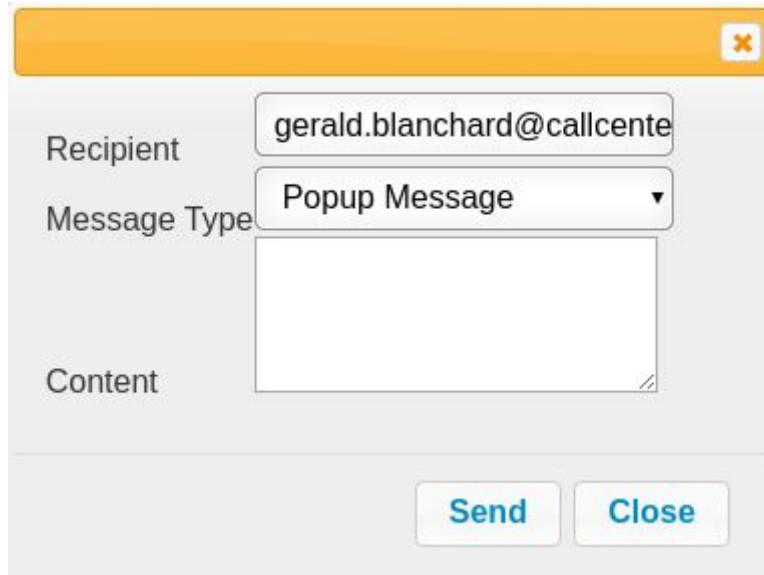
1. Click the  button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



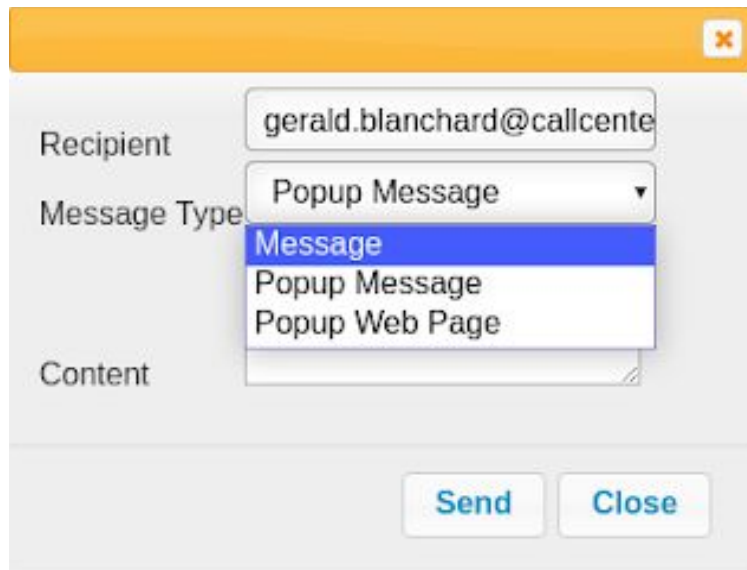
Note: the following options are only available when the agent is in “Talking” status:

- *Listen on the computer*
- *Listen on the phone*

-
5. Click the “Send Message” button; the following pop-up window will appear:



6. Click the ‘Message Type’ dropdown box. The following selections will appear:




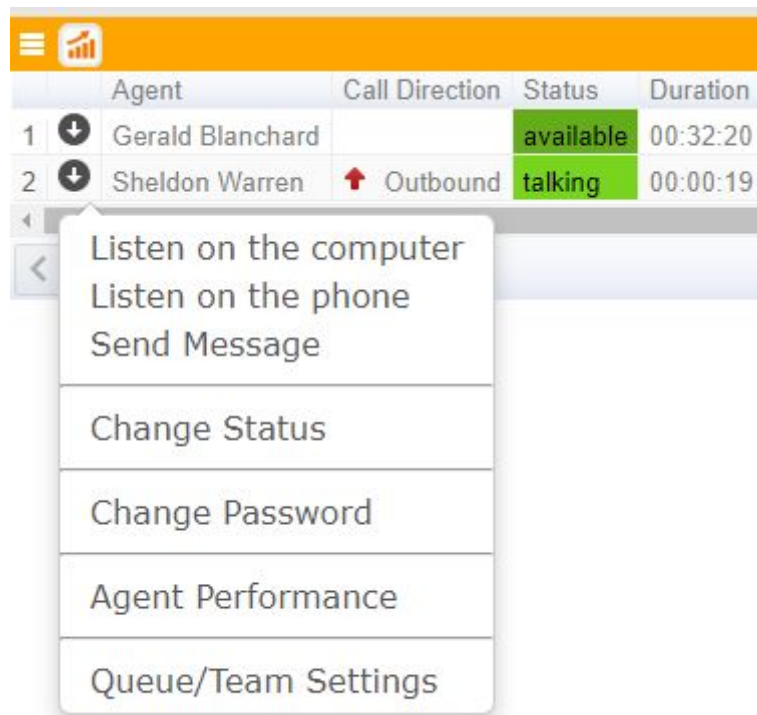
7. Select the desired message type.
8. Click the “Content” input box, type the desired message.

9. Click the “Send” button,



Changing an Agent’s Status

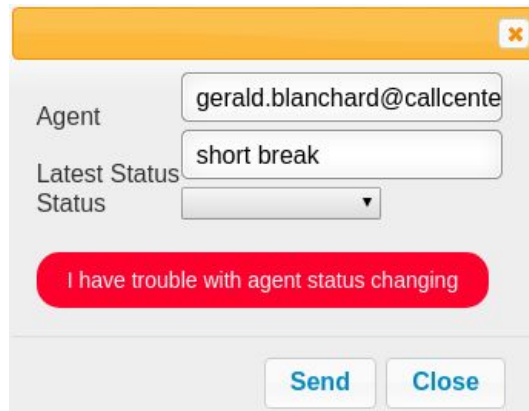
1. Click the  button of the desired agent. This button is located to the left of the agent’s name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:

- *Listen on the computer*
- *Listen on the phone*

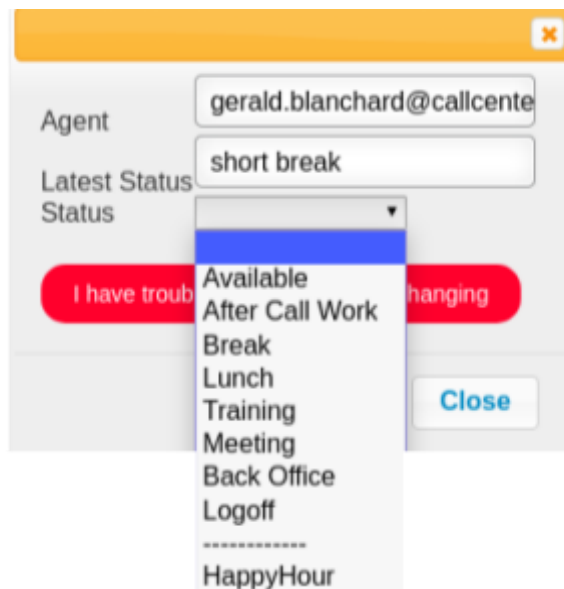
- Click the “Change Status” button; the following pop-up window will appear:



A pop-up window with an orange header bar containing a close button (X). The window contains the following fields and buttons:

- Agent:** A text input field containing the email address `gerald.blanchard@callcente`.
- Latest Status:** A text input field containing the text `short break`.
- Status:** A dropdown menu with a downward arrow.
- Message:** A red button with the text `I have trouble with agent status changing`.
- Buttons:** Two buttons at the bottom: `Send` and `Close`.

- Click the “Status” dropdown box. The following drop-down menu will appear:



The status dropdown menu is open, showing a list of status options. The options are:

- Available
- After Call Work
- Break
- Lunch
- Training
- Meeting
- Back Office
- Logoff
-
- HappyHour

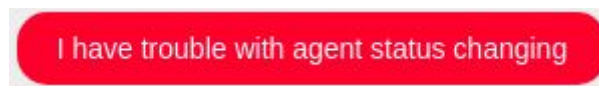
Note: Statuses below the dotted line are custom statuses created in the Statuses section of the administrator screen. Here a custom status is used to provide an example of how they appear on the supervisor screen.

4. Make a status selection.

5. Click the “Send” button,



Note: If you are having trouble making an agent status change, click the following button shown below:



The following pop-up window will appear:

demo2.callcenterstudio.com says

Are you sure?




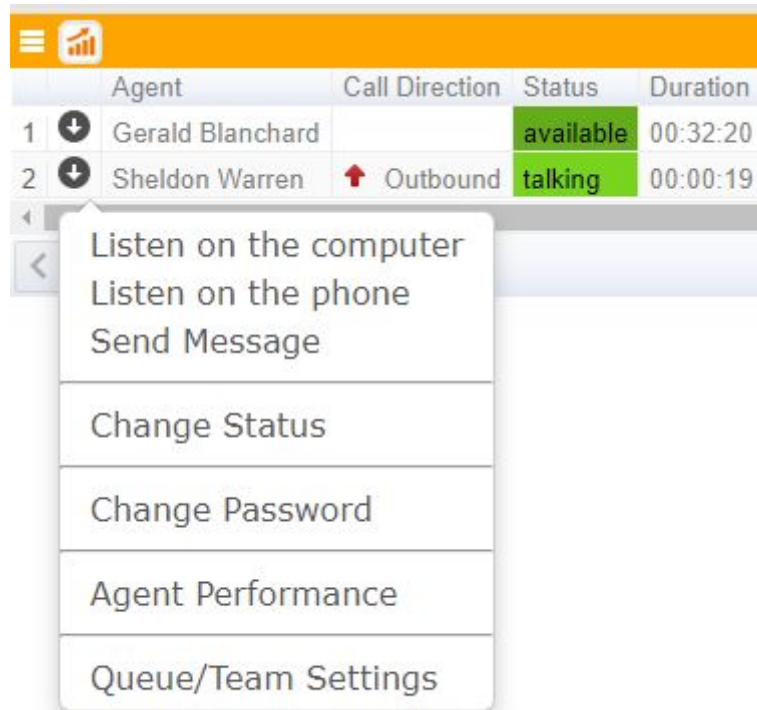
Note: This is using an example tenant; instead of demo2.callcenterstudio.com, it will be “YourDesiredTenantName.”callcenterstudio.com.

Click the Okay button,



Changing an Agent's Password

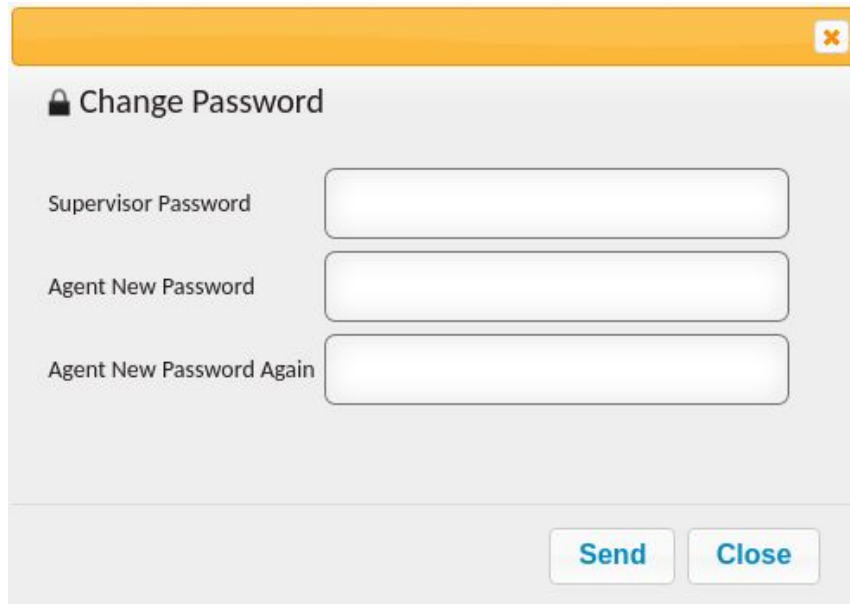
1. Click the  button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:




Note: the following options are only available when the agent is in “Talking” status:


- *Listen on the computer*
- *Listen on the phone*

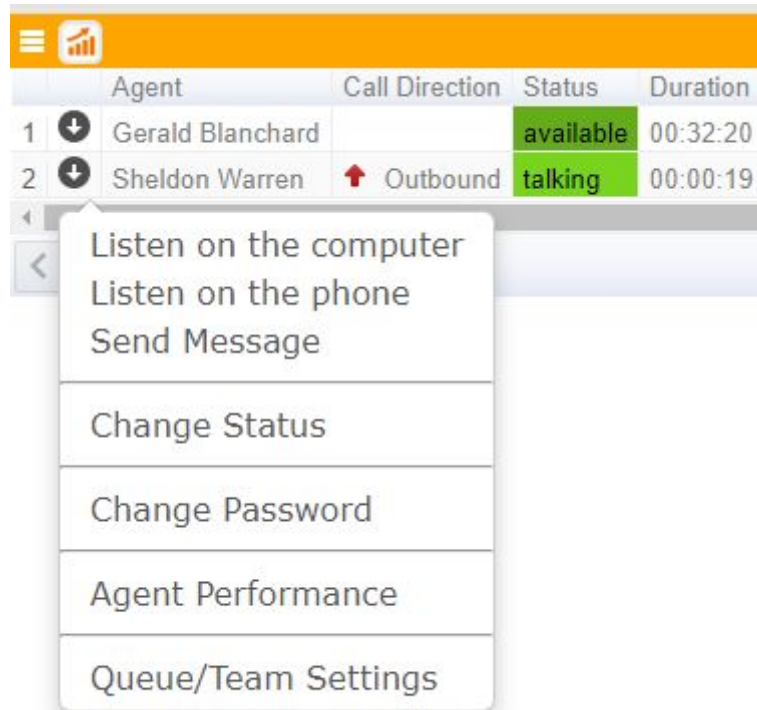
-
- Click the “Change Password” button. The following pop-up window will appear:

A screenshot of a "Change Password" pop-up window. The window has a yellow title bar with a close button (X) in the top right corner. The main area is light gray and contains the title "Change Password" with a lock icon. Below the title are three input fields: "Supervisor Password", "Agent New Password", and "Agent New Password Again". At the bottom right of the window are two buttons: "Send" and "Close".

- Click the “Supervisor Password” input box, type the password for the supervisor account in use.
- Click the “Agent New Password” input box, type the agent’s desired new password.
- Click the “Agent New Password Again” input box, type the agent’s desired new password again.
- Click the “Save button,  .

Viewing Agent's Performance

1. Click the  button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:


- *Listen on the computer*
- *Listen on the phone*

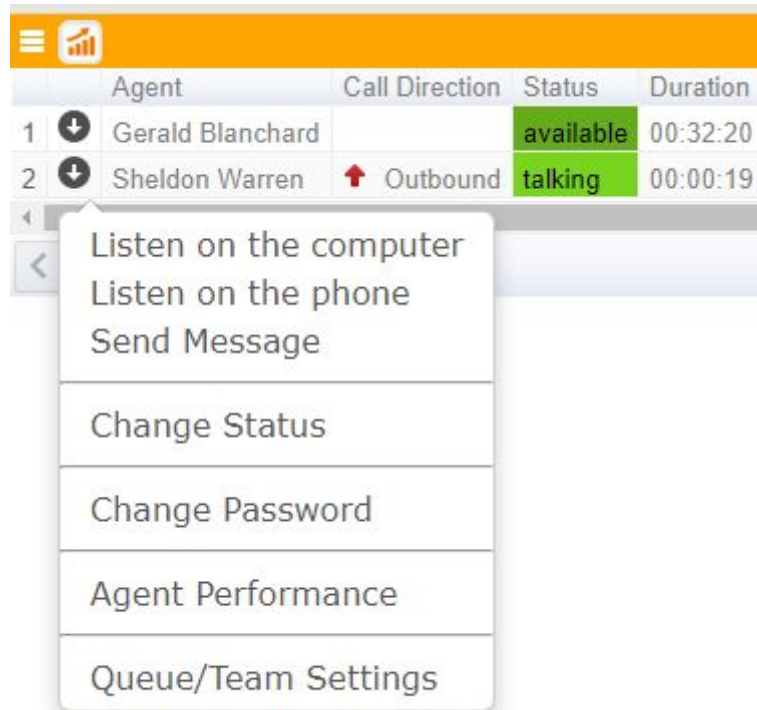
- Click the “Agent Performance” button. The following pop-up window will appear:



- After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Changing Agent's Queue / Team Settings

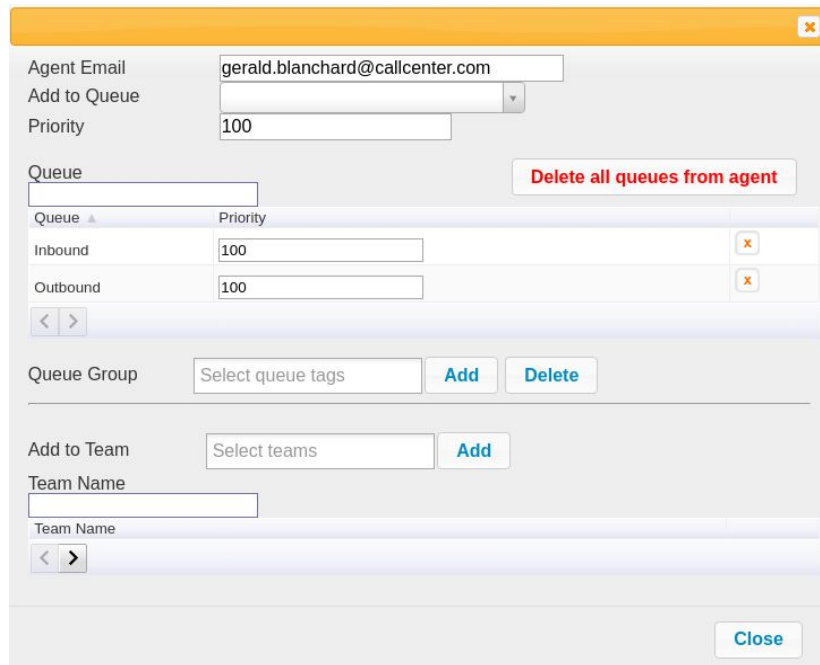
1. Click the  button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:

- *Listen on the computer*
- *Listen on the phone*

2. Click the “Queue / Team Settings” button. The following pop-up window will appear:



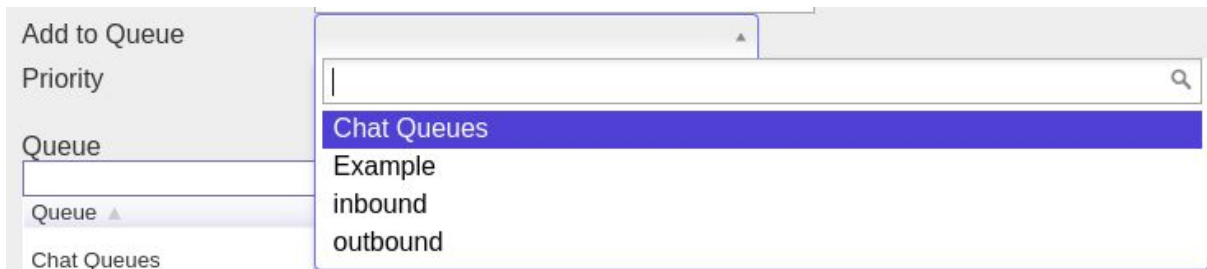
The screenshot shows a pop-up window titled "Queue / Team Settings" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Agent Email:** A text input field containing "gerald.blanchard@callcenter.com".
- Add to Queue:** A dropdown menu.
- Priority:** A text input field containing "100".
- Queue:** A text input field.
- Delete all queues from agent:** A red button.
- Queue List:** A table with two columns: "Queue" and "Priority".

Queue	Priority	
Inbound	100	X
Outbound	100	X
- Queue Group:** A text input field containing "Select queue tags", followed by "Add" and "Delete" buttons.
- Add to Team:** A text input field containing "Select teams", followed by an "Add" button.
- Team Name:** A text input field.
- Team Name:** A text input field.
- Navigation:** Left and right arrow buttons.
- Close:** A button in the bottom right corner.

Adding Agent to a Queue

1. As you can see underneath the Agent Email, the agent can be added to multiple queues:



The screenshot shows a web interface with a section titled 'Add to Queue'. It contains a 'Priority' label, a 'Queue' label, and a dropdown menu. The dropdown menu is open, showing a search bar and a list of options: 'Chat Queues' (highlighted in blue), 'Example', 'inbound', and 'outbound'.

2. In most cases, the priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the priority value is set at 100 for John, meaning he will be the first to receive an inquiry within a defined queue.




The screenshot shows a web interface with a 'Priority' label and an input field containing the value '100'.

3. 'Queue' Box allows the user to type the name of a queue manually. (For searching purposes)







The screenshot shows a web interface with a 'Queue' label and an empty input field.

4. "Delete all queues from the agent" button is located right next to it, allowing the user to remove the agent from all the previously assigned queues.




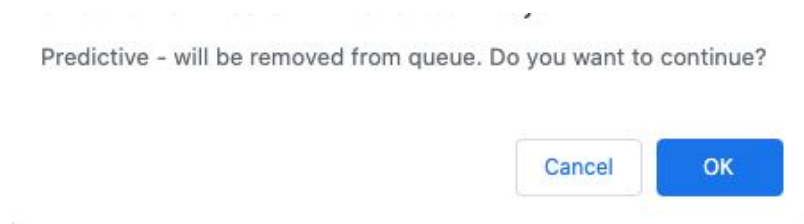
The screenshot shows a button with the text 'Delete all queues from agent' in red.



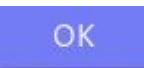
5. Added queues and priority levels can be seen here.

Queue ▲	Priority	
Predictive	<input type="text" value="100"/>	
Sales	<input type="text" value="100"/>	
Technical Support	<input type="text" value="100"/>	
Test_Q	<input type="text" value="100"/>	
<div> <div><</div> <div>></div> </div>		

Deleting a Queue

- To delete queues from the user, click the delete button  , located to the far right of the desired queue. When the delete button is clicked the following pop-up will appear:

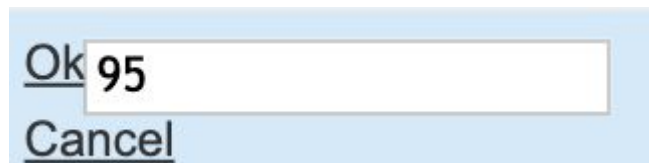


- Select the cancel button,  , will cancel the deletion.
 - Select the OK button,  , will confirm the deletion.
- Confirm the deletion by clicking the OK button,  .

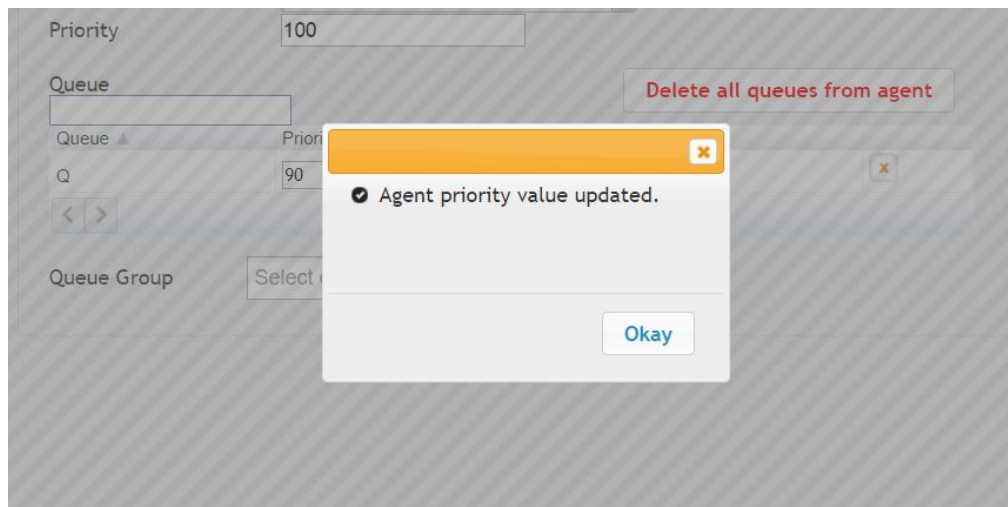
The screen will reload, and the deleted queue will not be shown.

Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in adding a user section.



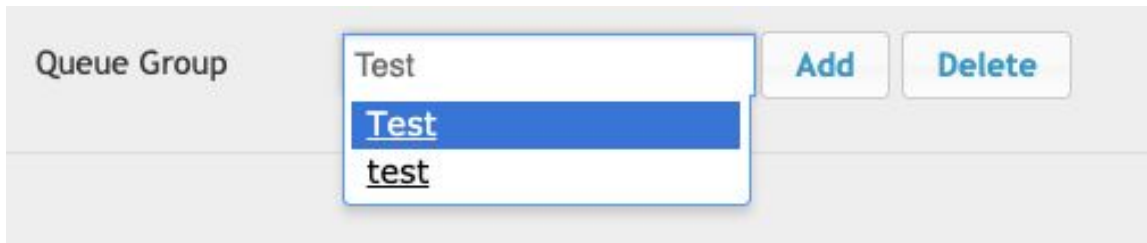
2. Click the Ok button, **Ok**, to acknowledge the additions and to update the priority value.




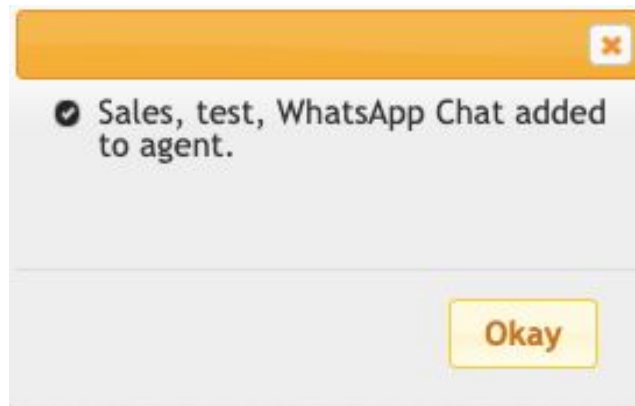
3. Click the cancel button, **Cancel**, to cancel the change.

Adding an Agent to a Queue Group

1. Click the desired “Queue group” to add the user to a queue group:



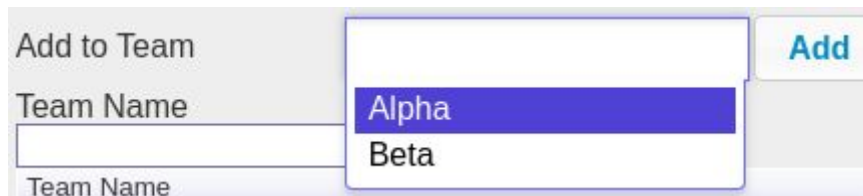
2. Once the queue group is selected, click the Add button, , When the add button is clicked the following pop-up will appear:



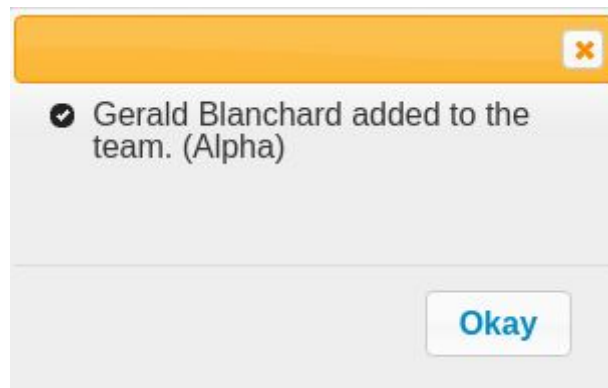
3. Select the Okay button, , to confirm the addition.

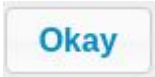
Adding an Agent to a Team

1. Click the “Add to Team” input box, the following dropdown menu with available teams will appear:




2. Select the desired team.
3. Click the “Add” button, . The following pop-up window will appear:

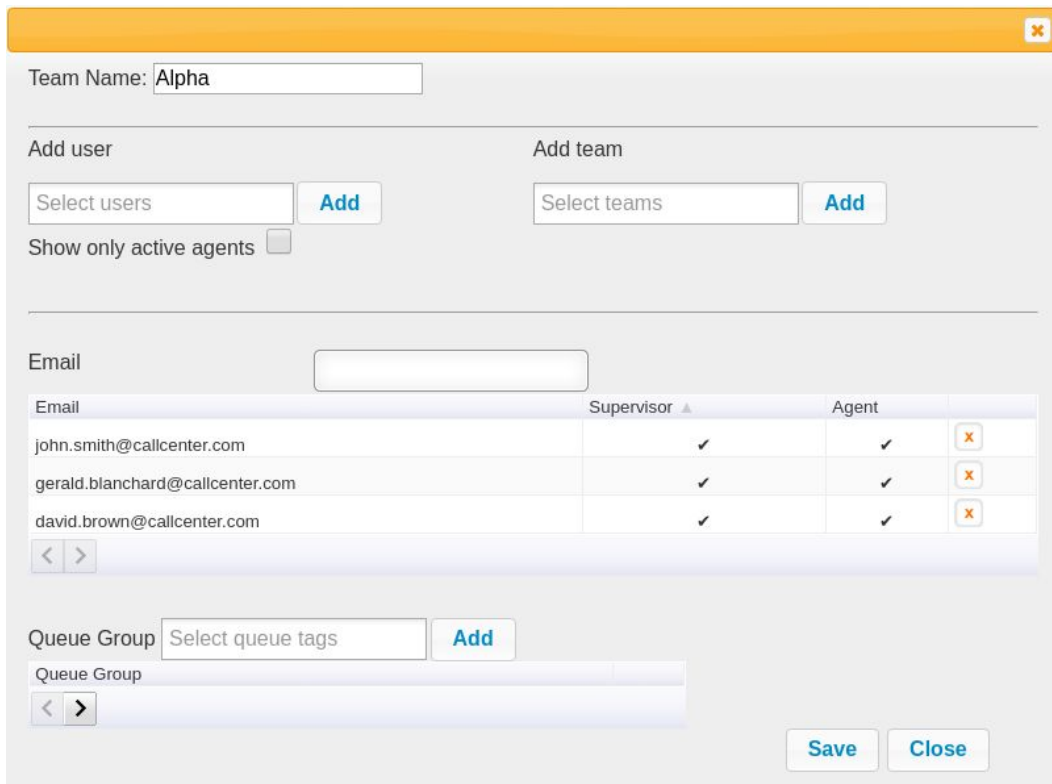


-
4. Click the “Okay” button, . The team list will show the updated team, as shown below:

A screenshot of a software interface for managing teams. At the top, there is a label "Team Name" above a text input field. Below this is a table with a header row containing "Team Name" and a small upward-pointing triangle. The first row of the table has the text "Alpha" in the "Team Name" column. To the right of the text in the first row are two small icons: a pencil (edit) and an 'x' (delete). At the bottom left of the table area are two navigation buttons, "<" and ">".

Editing a Team

1. Click the edit button, , of the desired team from the individual Agent's Queue / Team Settings. The following window will appear:



Team Name:

Add user




Select users
Add

Add team

Select teams
Add

Show only active agents ☐

Email

Email	Supervisor ▲	Agent	
john.smith@callcenter.com	✓	✓	
gerald.blanchard@callcenter.com	✓	✓	
david.brown@callcenter.com	✓	✓	

< >

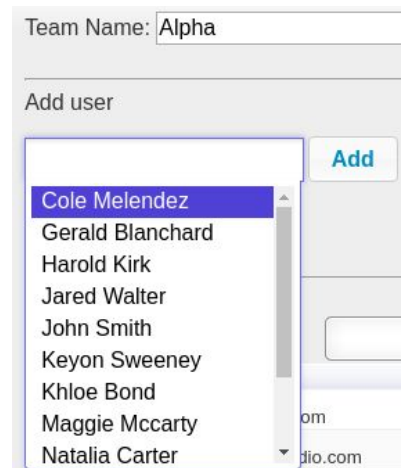
Queue Group Add

Queue Group

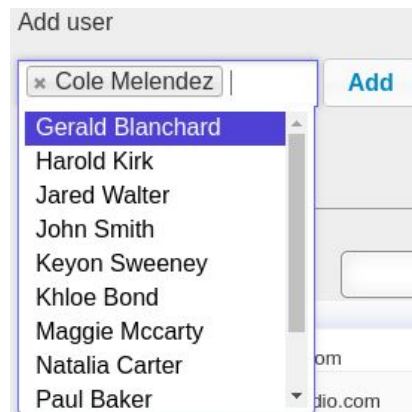
< >

Save Close

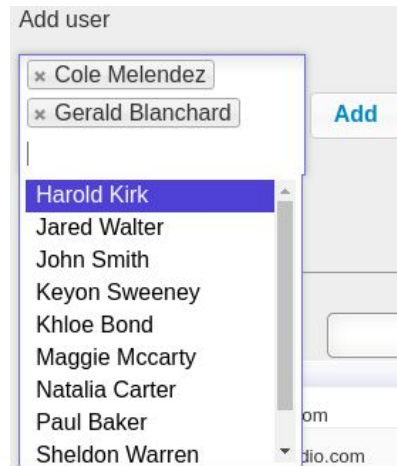
-
2. Add users to the team by clicking the “Select users” input box, a dropdown list of available users will appear, as shown below:



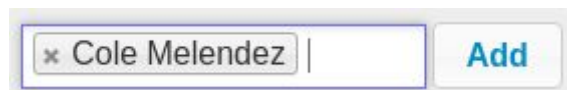
3. Click the desired user, “Cole Melendez,” from the dropdown list, if down correctly the selection will look like the picture below:




Note: Multiple users can be added at the same time. For example, “Gerald Blanchard,” can be selected, as shown below:

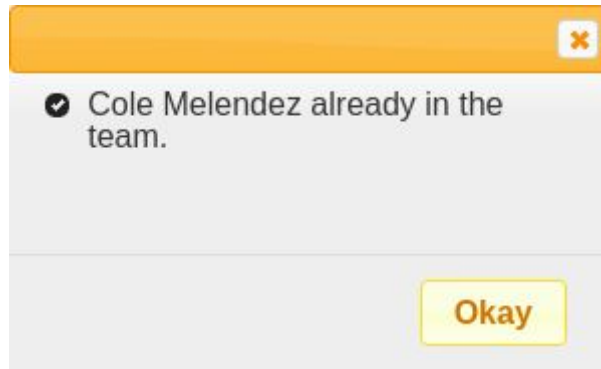



Both of the desired users were added to the input box above. If a user was clicked by accident, the user could be removed by pressing the, “X,” to the left of the user’s name:



The user, “Gerald Blanchard,” was deleted from the user add list shown above.

4. To add the user (“Cole Melendez”) to the team, press the add button,  , if done correctly the following pop-up window will be displayed:



5. Click the Okay button,  , once the user will appear in the list as shown below:





Note: Their access level is also listed. In this example, Cole is both a Supervisor and an Agent indicated by the checkmarks.

Click the input box to the right of Email, type the desired user’s email. This search box can be used to find team members quickly, as shown below:



The search box can be used to search for users. Click the input box, type the user's email.




Team members can be deleted here by pressing, , to the right of checkmarks. If the, , is clicked the pop-up below will be shown to confirm the deletion:

demo.callcenterstudio.com says

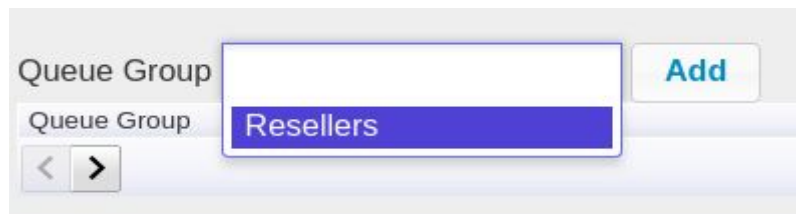
cole.melendez@callcenterstudio.com; queue will be deleted permanently. Do you want to continue?

Cancel

OK

- Select the cancel button, , will cancel the deletion.
- Select the OK button, , will confirm the deletion.

7. Once users are added, the team can be added to a queue. Add a team to a queue by clicking the “Select queue tags” input box, a dropdown list of available queues will appear, as shown below:




8. Click the desired queue, “Customer Service” (an example) from the dropdown list, if down correctly the selection will look like the picture below:





Note:

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, “X”, to the left of the queue name.*

9. To add the queue (“Customer Service”) to the team, press the add button,  , if done correctly, the queue will be displayed under the “Queue Group” list as shown below:




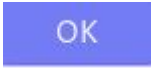
Queues can be deleted here as well by pressing,  , to the right of the queue name. If the,  , is clicked the pop-up below will be shown to confirm the deletion:


demo.callcenterstudio.com says

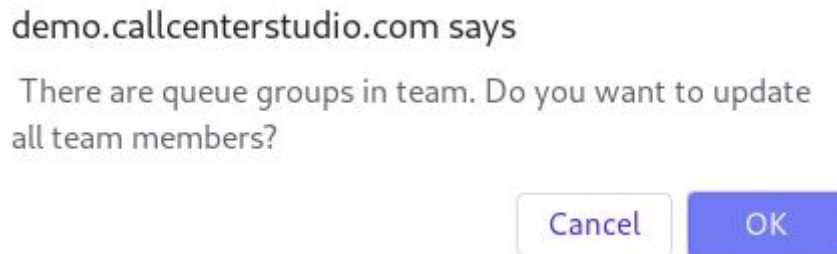
Customer Service - will be removed. Do you want to continue?

Cancel

OK

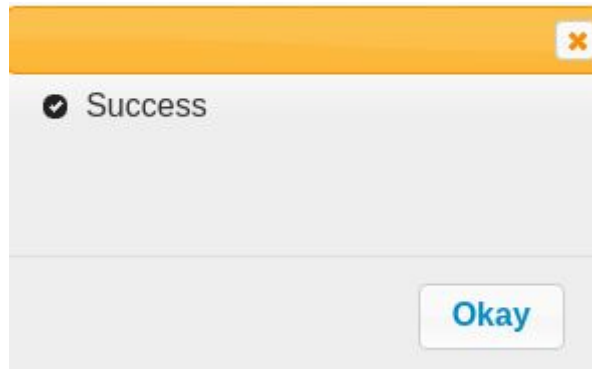
- Select the cancel button,  , will cancel the deletion.
- Select the OK button,  , will confirm the deletion.

10. Once the user and queue selection is complete, the information can be saved by clicking the save button, , the following pop-up box will appear:




11. Click the Ok button, , to confirm the update.

After pressing the “Ok” button, the following pop-up window will be displayed:



Deleting an Agent from a Team




1. Click the delete button, , of the desired team from the individual Agent's Queue / Team Settings. The following pop-up window will appear:

demo.callcenterstudio.com says


cole.melendez@callcenterstudio.com; queue will be deleted permanently. Do you want to continue?

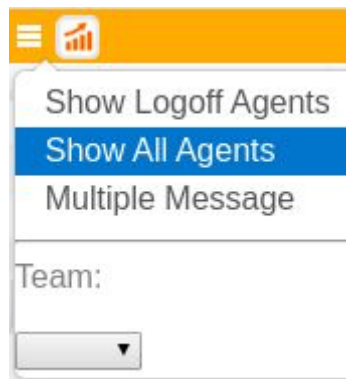
Cancel

OK

- Select the cancel button, , will cancel the deletion.
 - Select the OK button, , will confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

Viewing Logged Off Agents

1. Click the  button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the “Show Logoff Agents” button. The following pop-up window will appear:




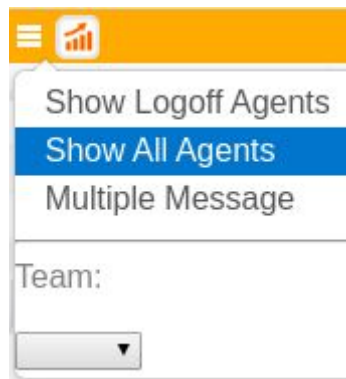
A pop-up window with an orange header bar and a close button (X) in the top right corner. The window displays a table of logged off agents.

Agent	Status
David Brown	logoff
John Smith	logoff
Sally Thompson	logoff
Wyatt Black	logoff
Sam Grey	logoff
David White	logoff
Lisa Kelly	logoff
Adam Johnson	logoff
Emily Blackwater	logoff
Charlie Hogan	logoff

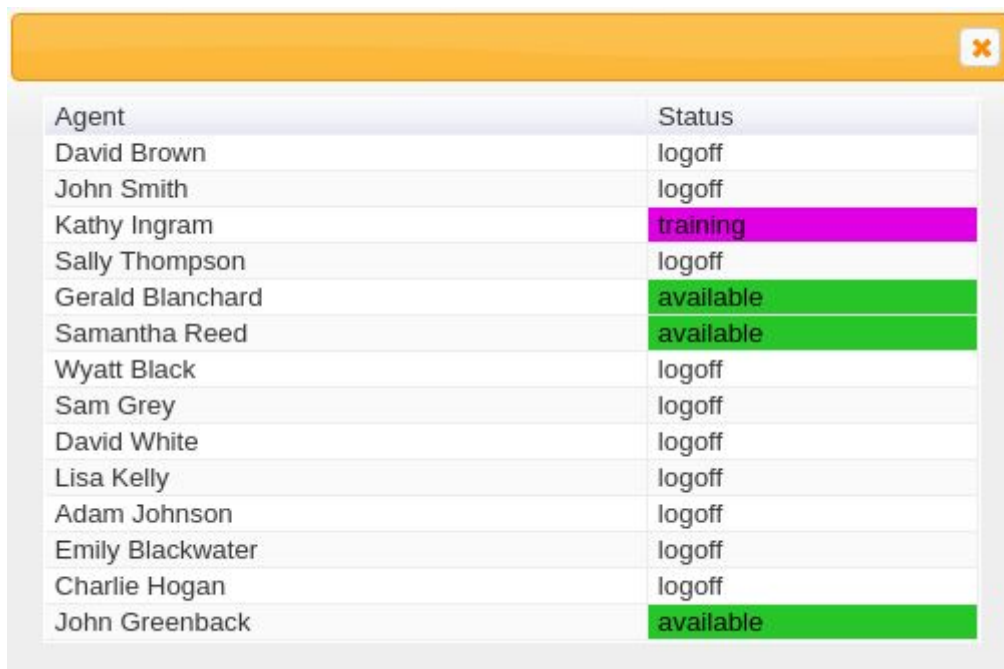
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Viewing All Agents

1. Click the  button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the “Show All Agents” button. The following pop-up window will appear:




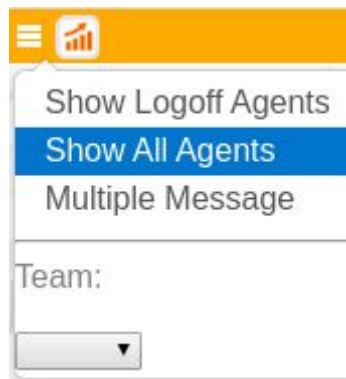
A pop-up window with an orange header bar and a close button (X) in the top right corner. It displays a table with two columns: 'Agent' and 'Status'.

Agent	Status
David Brown	logoff
John Smith	logoff
Kathy Ingram	training
Sally Thompson	logoff
Gerald Blanchard	available
Samantha Reed	available
Wyatt Black	logoff
Sam Grey	logoff
David White	logoff
Lisa Kelly	logoff
Adam Johnson	logoff
Emily Blackwater	logoff
Charlie Hogan	logoff
John Greenback	available

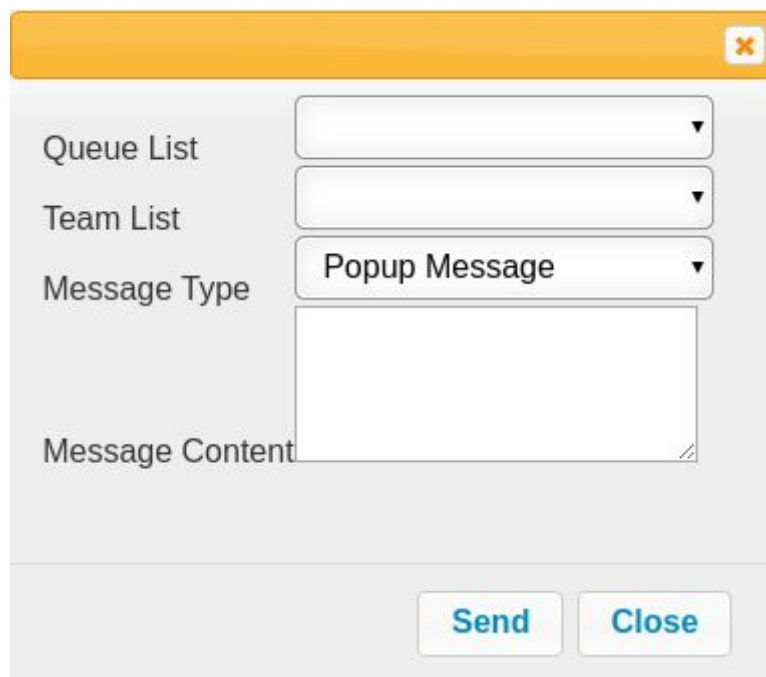
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Sending a Message to Multiple Agents


1. Click the  button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:




2. Click the “Multiple Message” button. The following pop-up window will appear:

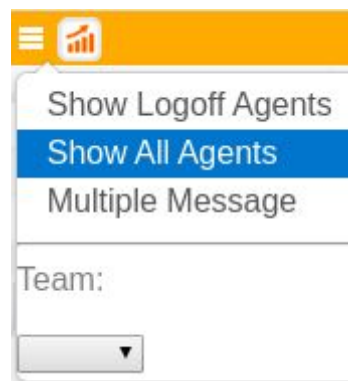
A screenshot of a pop-up window titled "Multiple Message". The window has a yellow header bar with a close button. It contains three dropdown menus: "Queue List", "Team List", and "Message Type" (set to "Popup Message"). Below these is a large text area for "Message Content". At the bottom are "Send" and "Close" buttons.

3. Click the “Queue List” dropdown box, select the desired queue.
4. Click the “Team List” dropdown box, select the desired team.

5. Click the “Message Type” dropdown box, select the desired message type.
6. Click the “Message Content” input box, type the desired message.
7. Click the “Send” button, .

Filter Agent Status List by Team

1. Click the  button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the “Team” dropdown box, select the desired team. The updated agent status list will only show the members of the selected team.

Waiting Calls & Waiting Chats


Details about how many calls and chats are in waiting status and the queue with the longest wait time can be viewed here.

If desired, a waiting call or chat alarm can be created in the alarms menu, and it can be highlighted to catch the user's attention.

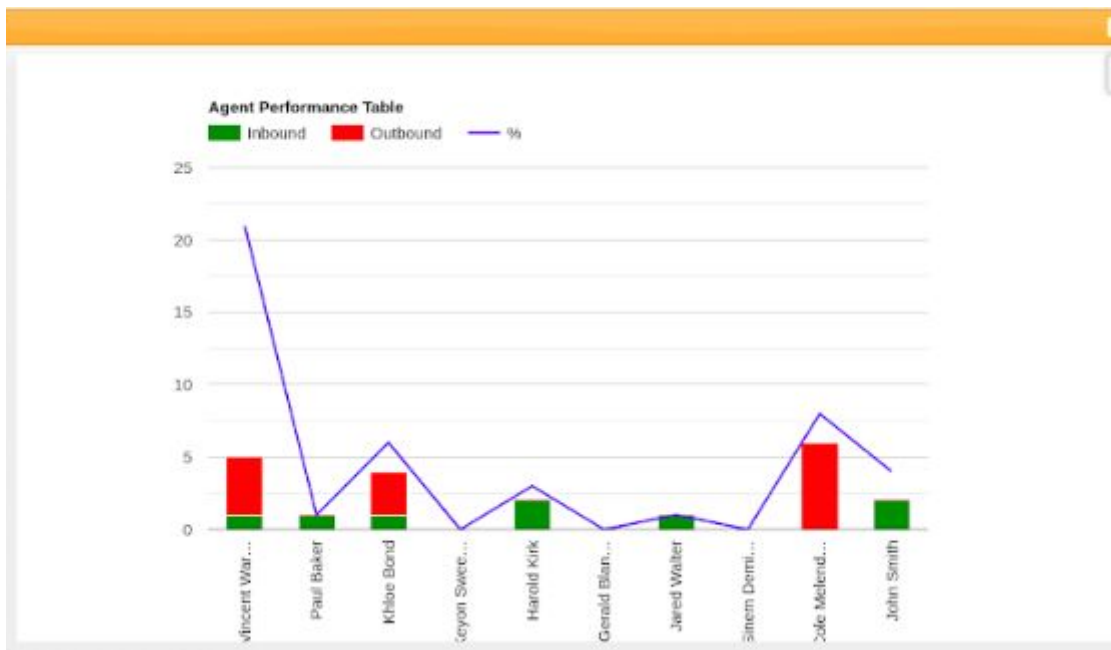
Waiting Calls		
Queue	Call	Longest (Duration)
inbound	2	39
Total	2	39

Waiting Chats		
Queue	Chat	Longest (Duration) Chat
inbound	1	13
Total	1	13

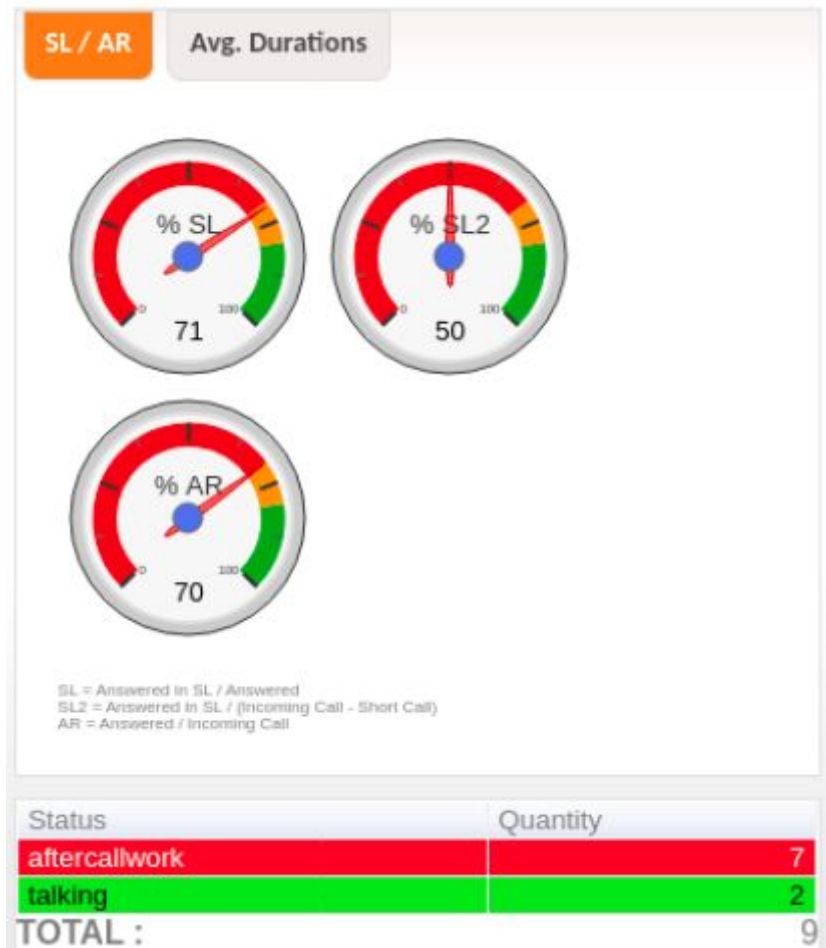
Viewing Agent Performance Graphically

1. Click the  button, located in the top left-hand corner of the Agent Status List.

The following graph will appear:



SL/AR and Average Holding Times



Service levels and answering ratios are displayed here:

SL Ratio:

$$\frac{\text{Answered calls}}{\text{Incoming call - Short call}}$$

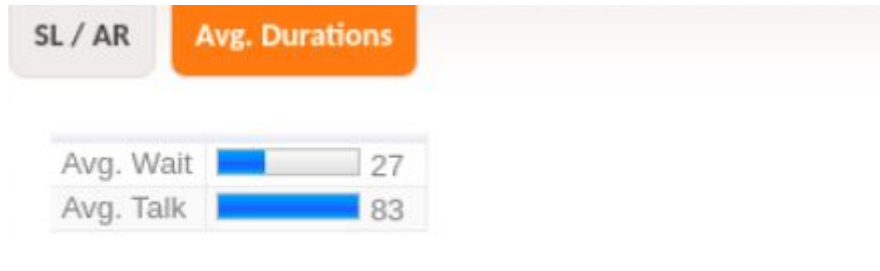
SL2 Ratio:

$$\frac{\text{Calls answered in the service level}}{\text{Incoming calls - Short calls}}$$

Answering Ratio (Answer Rate (AR)):

$$\frac{\text{Answered calls}}{\text{Incoming calls}}$$

Average Holding Times




Status

Statuses of customer representatives are listed in this module. Customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

aftercallwork	1
available	20
backoffice	20
shortbreak	3
talking	25
training	10
wrapup	1
TOTAL	80

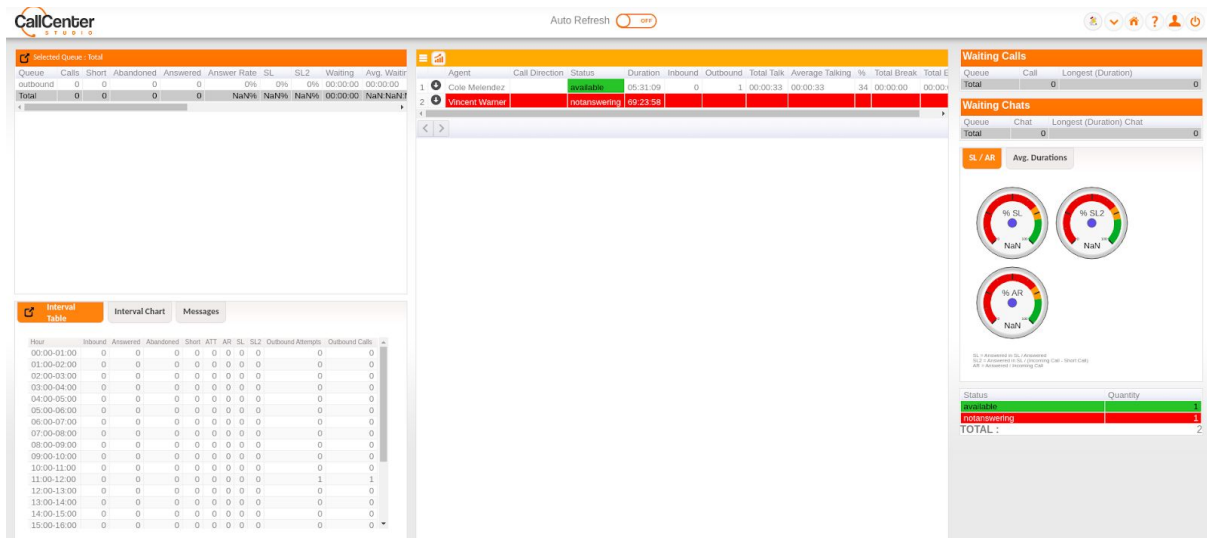
Queue Tab

The Queue tab button is used to refresh the default screen when the auto-refresh is not used.


1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:



2. Select the “Queue” tab. The following screen will appear as a refreshed version of the default screen:



Agent Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:




2. Select the “Agent” tab. The following screen will appear:

By Status

<div>Available (1)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td>1 Cole Melendez</td><td>Available</td><td>00:07:36</td></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	1 Cole Melendez	Available	00:07:36	< >			<div>Back Office (1)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td>1 Khloe Bond</td><td>Back Office</td><td>00:07:19</td></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	1 Khloe Bond	Back Office	00:07:19	< >			<div>ACW (2)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td>1 Harold Kirk</td><td>ACW</td><td>00:11:35</td></tr><tr><td>2 Gerald Blanchard</td><td>ACW</td><td>00:11:27</td></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	1 Harold Kirk	ACW	00:11:35	2 Gerald Blanchard	ACW	00:11:27	< >			<div>Lunch and Short Break(2)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td>1 Keyon Sweeney</td><td>Lunch</td><td>00:08:15</td></tr><tr><td>2 John Smith</td><td>Lunch</td><td>00:08:16</td></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	1 Keyon Sweeney	Lunch	00:08:15	2 John Smith	Lunch	00:08:16	< >			<div>Training and Meeting (2)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td>1 Vincent Warner</td><td>Training</td><td>00:08:03</td></tr><tr><td>2 Jared Walter</td><td>Training</td><td>00:07:56</td></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	1 Vincent Warner	Training	00:08:03	2 Jared Walter	Training	00:07:56	< >		
Name	Status	Duration																																																								
1 Cole Melendez	Available	00:07:36																																																								
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Name	Status	Duration																																																								
1 Khloe Bond	Back Office	00:07:19																																																								
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1 Keyon Sweeney	Lunch	00:08:15																																																								
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Name	Status	Duration																																																								
1 Vincent Warner	Training	00:08:03																																																								
2 Jared Walter	Training	00:07:56																																																								
< >																																																										
<div>Talking (0)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	< >			<div>Not Answering (0)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	< >			<div>Charting (0)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	< >			<div>Custom Status (0)</div> <table><tr><th>Name</th><th>Status</th><th>Duration</th></tr><tr><td colspan="3">< ></td></tr></table>	Name	Status	Duration	< >			<div>Waiting Calls</div> <table><tr><th>Queue</th><th>Call</th><th>Longest (Duration)</th></tr><tr><td>Total</td><td>0</td><td>0</td></tr></table>	Queue	Call	Longest (Duration)	Total	0	0																								
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Queue	Call	Longest (Duration)																																																								
Total	0	0																																																								
<div>Waiting Chats</div> <table><tr><th>Queue</th><th>Chat</th><th>Longest (Duration)</th><th>Chat</th></tr><tr><td>Total</td><td>0</td><td></td><td>0</td></tr></table>					Queue	Chat	Longest (Duration)	Chat	Total	0		0																																														
Queue	Chat	Longest (Duration)	Chat																																																							
Total	0		0																																																							

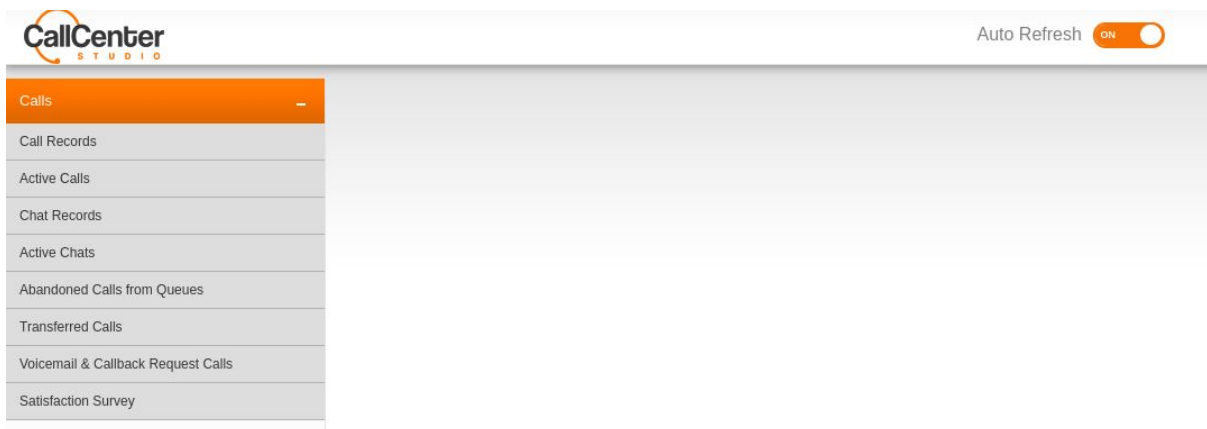
Agents can be followed according to status in this menu.

Call Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:



2. Select the “Call” tab. The following screen will appear:




3. For a complete explanation of the Call Tab, see the Quality Control Section > Call Tab.

Campaign Tab

Campaigns are used for using the dialers built-in to Call Center Studio. Campaigns operate according to determined criteria.

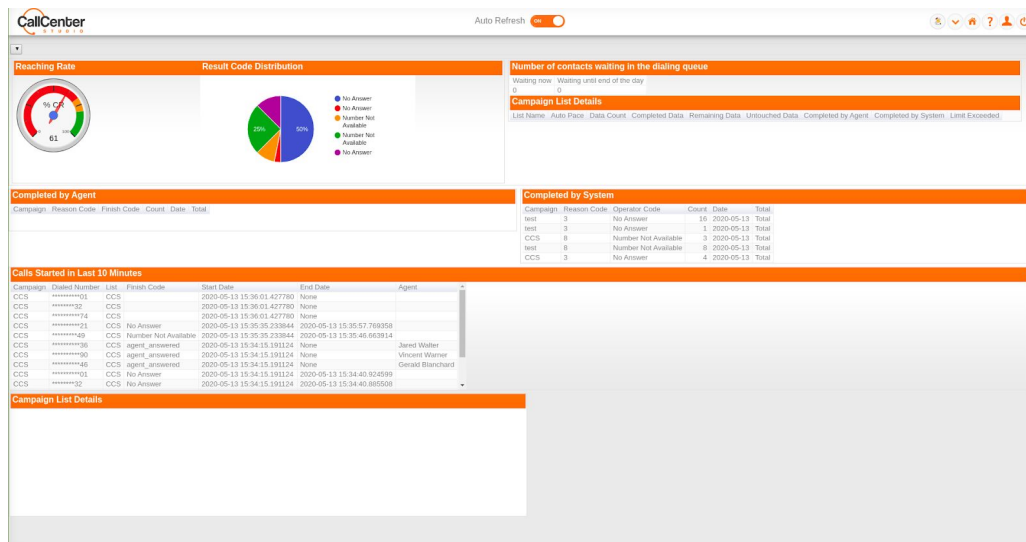
If there is a campaign, details belonging to that campaign can be seen on the campaign screen. Such information as reaching ratios, distribution of result codes, loaded lists, metrics on calls completed, customer representative info, and result codes can be accessed.

Moreover, the last 10-minute call logs called with Dialer System are also listed.

- In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:




- Select the “Campaign” tab. The following screen will appear:



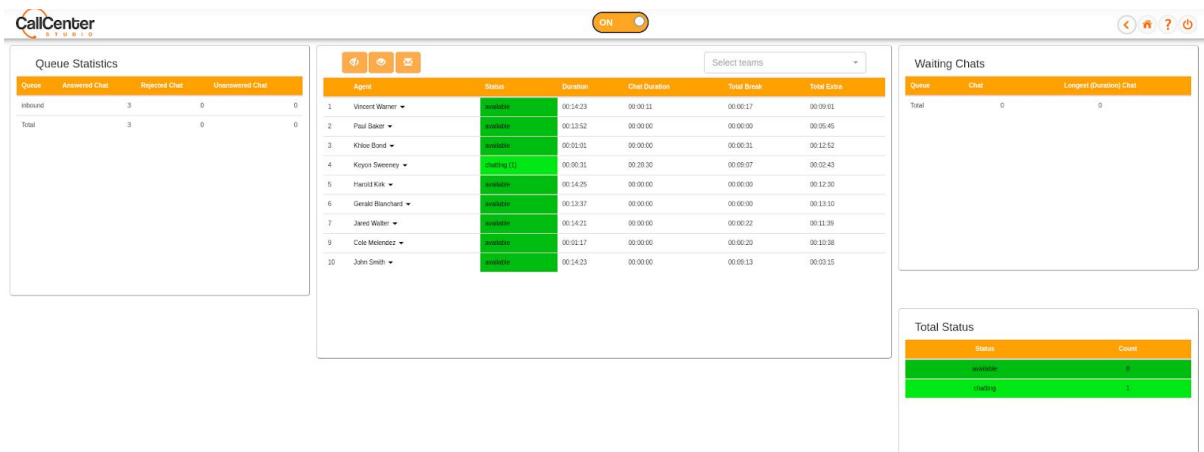
Chat Tab

The chat tab has similar features to the default supervisor screen, except it is solely used for monitoring chatting agents.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:



2. Select the “Chat” tab. The following screen will appear:



Queue Statistics

Queue	Answered Chat	Rejected Chat	Unanswered Chat
Inbound	3	0	0
Total	3	0	0

Agent Chat Activity

Agent	Name	Duration	Chat Duration	Total Break	Total Score
1	Vincent Warren	00:14:23	00:00:11	00:00:17	00:00:01
2	Paul Baker	00:13:52	00:00:00	00:00:00	00:00:45
3	Khris Bond	00:01:01	00:00:00	00:00:31	00:12:52
4	Kyara Seemey	00:00:31	00:28:30	00:08:07	00:00:43
5	Harold Kirk	00:14:25	00:00:00	00:00:00	00:12:30
6	Gerald Blanchard	00:13:37	00:00:00	00:00:00	00:13:10
7	Jared Walder	00:14:21	00:00:00	00:00:22	00:11:39
9	Cole Melendez	00:01:17	00:00:00	00:00:20	00:10:38
10	John Smith	00:14:23	00:00:00	00:00:13	00:00:15

Waiting Chats

Queue	Chat	Longest (Duration) Chat
Total	0	0

Total Status

Status	Count
Available	0
Chatting	1

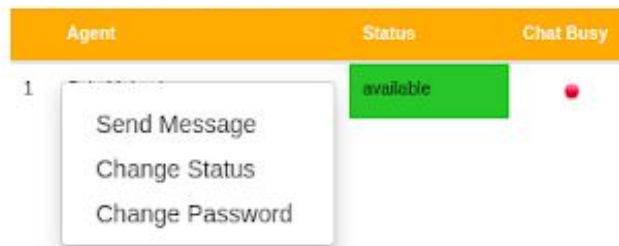
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details length of status, duration, and chat totals are provided here. Agents can be messaged; their status can be changed along with their password.

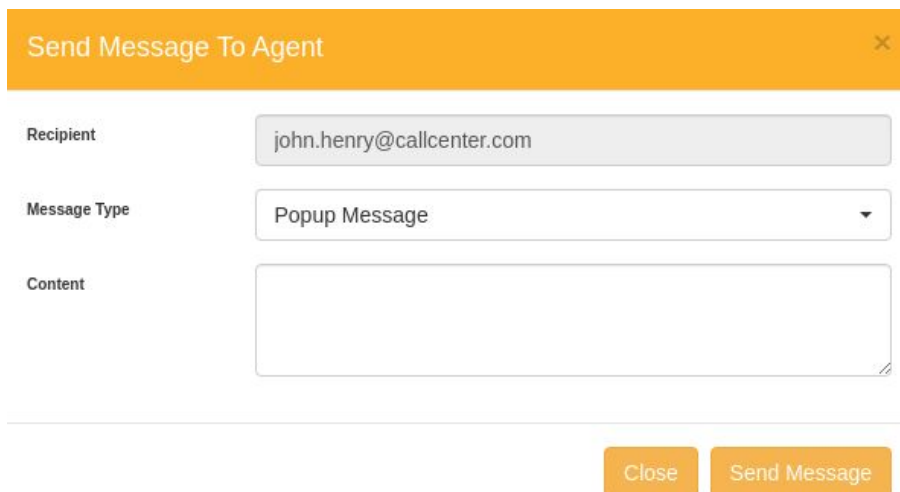
	Agent	Status	Duration	Chat Duration	Total Break	Total Extra
1	Vincent Warner ▼	available	00:14:23	00:00:11	00:00:17	00:09:01
2	Paul Baker ▼	available	00:13:52	00:00:00	00:00:00	00:05:45
3	Khloe Bond ▼	available	00:01:01	00:00:00	00:00:31	00:12:52
4	Keyon Sweeney ▼	chatting (1)	00:00:31	00:28:30	00:09:07	00:02:43
5	Harold Kirk ▼	available	00:14:25	00:00:00	00:00:00	00:12:30
6	Gerald Blanchard ▼	available	00:13:37	00:00:00	00:00:00	00:13:10
7	Jared Walter ▼	available	00:14:21	00:00:00	00:00:22	00:11:39
9	Cole Melendez ▼	available	00:01:17	00:00:00	00:00:20	00:10:38
10	John Smith ▼	available	00:14:23	00:00:00	00:09:13	00:03:15

Sending a Message to an Agent

1. Click the desired agent name. The following pop-up window will appear:

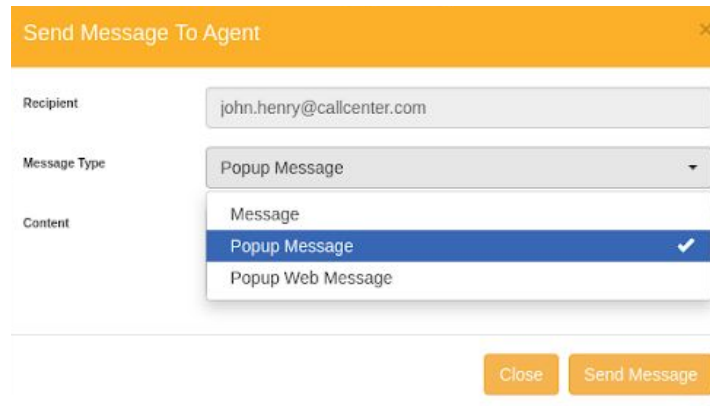



2. Click the “Send Message” button. The following pop-up window will appear:



The screenshot shows a pop-up window titled 'Send Message To Agent' with a close button (X) in the top right corner. The window contains three fields: 'Recipient' with the value 'john.henry@callcenter.com', 'Message Type' with a dropdown menu showing 'Popup Message', and 'Content' with a large text area. At the bottom right, there are two buttons: 'Close' and 'Send Message'.

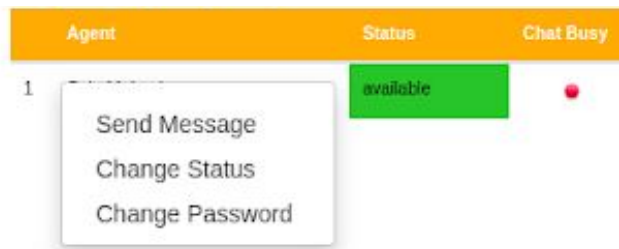
-
- Click the 'Message Type' dropdown box the following selections will appear:

A screenshot of a web application dialog box titled "Send Message To Agent" with a close button (X) in the top right corner. The dialog contains three input fields: "Recipient" with the value "john.henry@callcenter.com", "Message Type" with a dropdown menu, and "Content" which is currently empty. The "Message Type" dropdown is open, showing three options: "Message", "Popup Message" (which is selected and highlighted in blue with a checkmark), and "Popup Web Message". At the bottom right of the dialog are two buttons: "Close" and "Send Message".

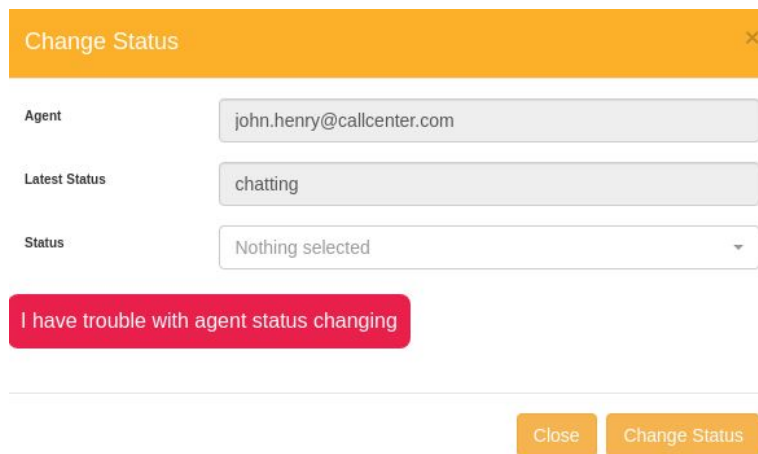
- Select the desired message type.
- Click the "Content" input box, type the desired message.
- Click the "Send Message" button, .

Changing an Agent's Status

1. Click the desired agent name. The following pop-up window will appear:

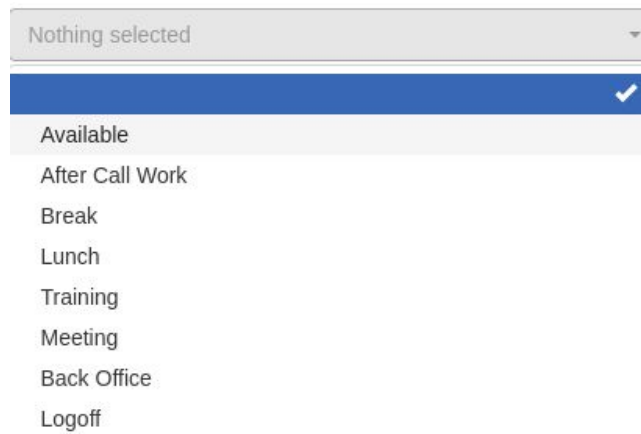


2. Click the “Change Status” button. The following pop-up window will appear:



The 'Change Status' pop-up window has an orange header with a close button. It contains three input fields: 'Agent' with the value 'john.henry@callcenter.com', 'Latest Status' with the value 'chatting', and 'Status' with a dropdown menu showing 'Nothing selected'. Below these fields is a red button that says 'I have trouble with agent status changing'. At the bottom right are two orange buttons: 'Close' and 'Change Status'.

-
3. Click the “Status” dropdown box. The following drop-down menu will appear:



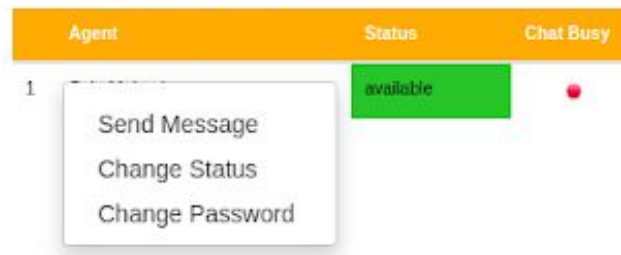
4. Make a status selection.

5. Click the “Change Status” button,

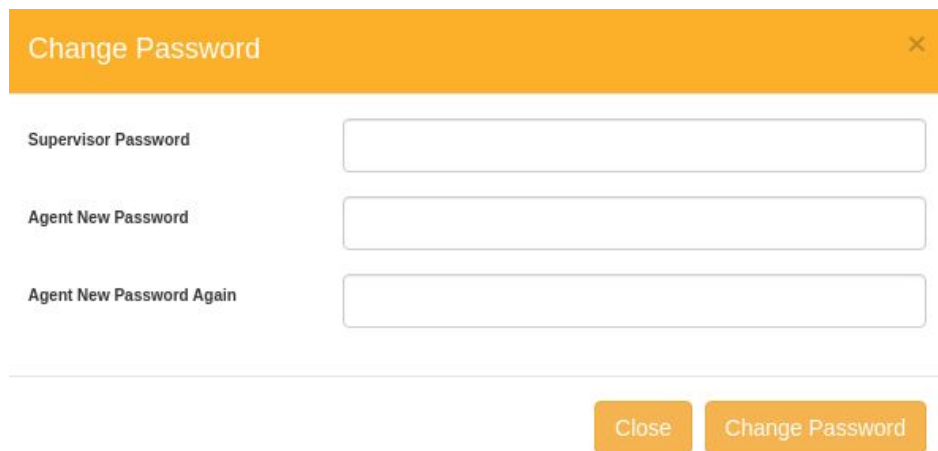
A rectangular orange button with the text "Change Status" in white, bold, sans-serif font.


Changing an Agent's Password

1. Click the desired agent name. The following pop-up window will appear:




2. Click the “Change Password” button. The following pop-up window will appear:




3. Click the “Supervisor Password” input box, type the password for the supervisor account in use.
4. Click the “Agent New Password” input box, type the agent’s desired new password.
5. Click the “Agent New Password Again” input box, type the agent’s desired new password again.
6. Click the “Change Password” button, .

Viewing Logged Off Agents

1. Click the “Show All Agents” button, , located in the top left-hand corner of the Agent Status List. The following pop-up window will appear:

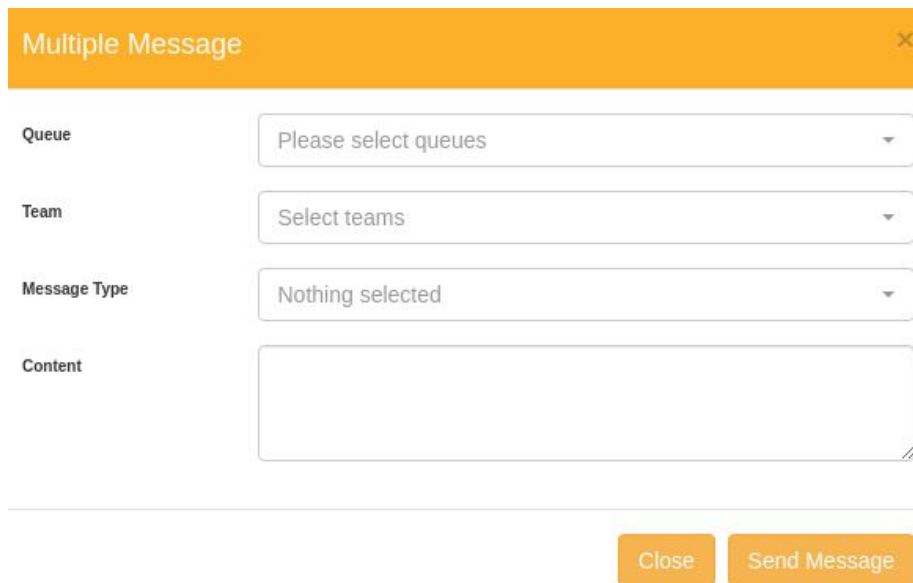
All Agents	
Agent	Status
Cole Melendez	available
Gerald Blanchard	notanswering
Harold Kirk	logoff
Jared Walter	aftercallwork
John Henry	chatting
John Smith	notanswering
Keyon Sweeney	logoff
Khloe Bond	logoff
Maggie Mccarty	notanswering
Natalia Carter	logoff
Paul Baker	logoff

2. After viewing, click the close button, .


Sending a Message to Multiple Agents

1. Click the  button, located in the top left-hand corner of the Agent Status List.

The following pop-up window will appear:

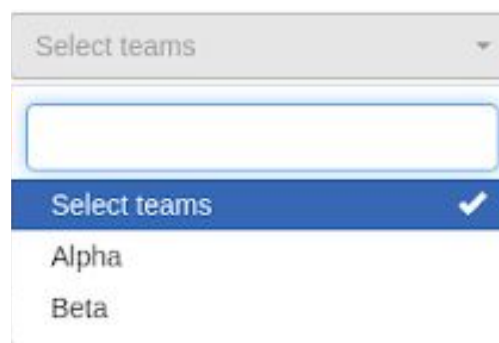


The image shows a pop-up window titled "Multiple Message" with a close button (X) in the top right corner. The window contains four labeled input fields: "Queue" with a dropdown menu showing "Please select queues", "Team" with a dropdown menu showing "Select teams", "Message Type" with a dropdown menu showing "Nothing selected", and "Content" with a large text input area. At the bottom right of the window, there are two buttons: "Close" and "Send Message".

2. Click the "Queue List" dropdown box, select the desired queue.
3. Click the "Team List" dropdown box, select the desired team.
4. Click the "Message Type" dropdown box, select the desired message type.
5. Click the "Message Content" input box, type the desired message.
6. Click the "Send Message" button, .

Filter Agent Status List by Team

1. Click the “Team” dropdown menu, located in the top right-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Select the desired team. The updated agent status list will only show the members of the selected team.

Queue Statistics

The queue statistics window displays information regarding the chat queues. Information such as answered chats rejected chats, and unanswered chats can be found here.

Queue Statistics			
Queue	Answered Chat	Rejected Chat	Unanswered Chat
Chat Queues	2	0	1
Total	2	0	1

Waiting Chats

The waiting chats window displays information regarding the chats waiting in the queues.

Information such as the number of waiting chats and the longest duration are shown here.

Waiting Chats

Queue	Chat	Longest (Duration) Chat
Chat Queues	1	17
Total	1	17

Status


Statuses of customer representatives are listed in this module. Moreover, customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

Total Status

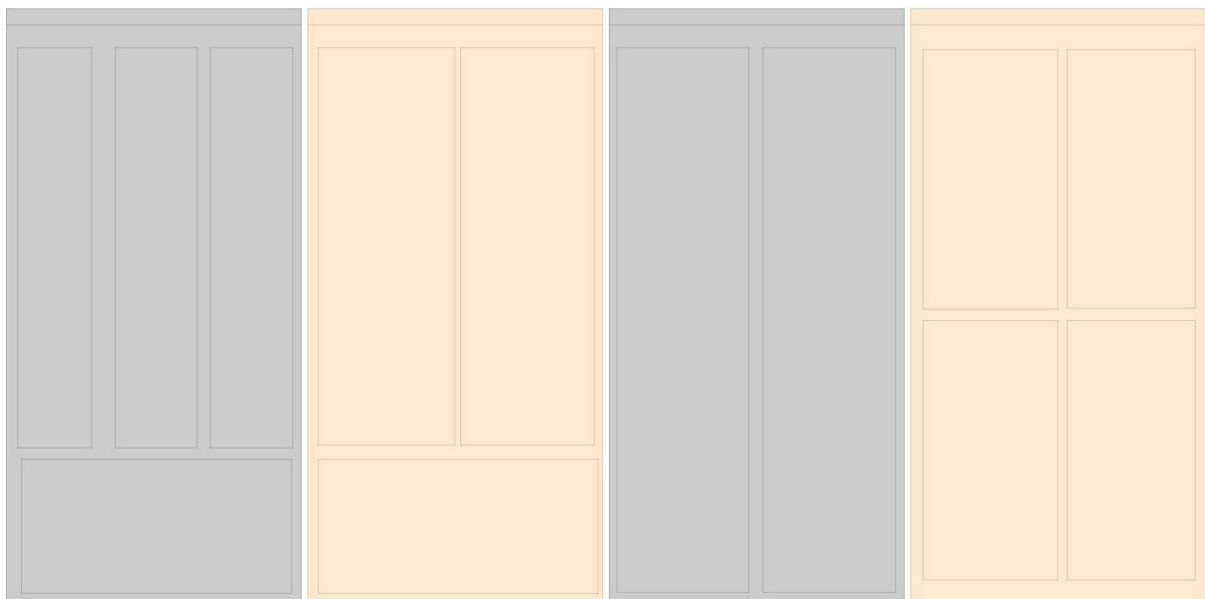
Status	Count
available	1
notanswering	3

Creating the Custom Supervisor Screen

Used to create a custom supervisor screen according to the supervisor's visual and metric-based needs.

1. In the top right section of the supervisor screen, click the  button, the following screen will appear:

New Supervisor Selection 1.Step



This screen provides four different ways to organize the supervisor's desired data.

2. Select the desired pane. The following screen will appear (For this example the first pane was selected):




3. Select the . The following dropdown menu will appear:



4. Select the desired metrics for the section.

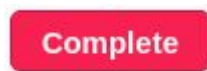
Note: Once a metric selection is made, it cannot be selected again for a different section

within the pane. If desired, it can be deselected by clicking the  button located to the far right of the metric's name. To assist in not making a duplicate selection, if the parameter has been selected, it will be shown in red on the dropdown menu. An example is shown below:



Note: Queue Performance was selected for a different section within the pane and is highlighted in red to notify the supervisor.

5. Repeat step 4 for all of the sections within the pane.
6. Once all of the desired selections have been made, click the “Complete” button,





. The custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the “Default Supervisor” button,



Editing the Custom Supervisor Screen

1. In the top right section of the supervisor screen, click the  button, the custom supervisor screen will appear.
2. In the top right section of the custom supervisor screen, click the “Update Supervisor” button, , the custom supervisor screen will appear (using the previously selected pane).

Note: To change the pane view, simply click the “Back” button,

Back

3. Make the desired changes.
4. Once all of the desired selections have been made, click the “Complete” button,

Complete

. The updated custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the “Default Supervisor” button,





Supervisor
